



Treasury Management Sales Officer

DEPT: Operations

REPORTS TO: Chief Administrative Officer

CLASSIFICATION: Exempt, Full-Time

Position Summary:

The Treasury Management (TM) Sales Officer role is responsible for driving growth in our commercial deposits by working directly with commercial customers, nonprofits, and municipalities by explaining the features and benefits of treasury products and services. The Treasury Management Sales Officer will assist in the implementation and provide ongoing support for TM products and services. In addition to direct customer support, this position will work with Loan Officers and retail staff on cross-selling opportunities and provide training in TM products. This position requires exceptional customer service and sales skills along with strong technological ability.

Duties and Responsibilities:

1. Proactively obtain new TM customers and expand relationships with existing customers.
2. Provide exceptional customer service by responding to customer needs, questions, and concerns in an accurate, effective, and timely manner.
3. Collaborate with Retail and Operations teams to manage sales efforts and ensure successful onboarding of new TM customers.
4. Prepare appropriate contracts, agreements, and account documentation for TM products and services in accordance with regulations and River Bank's policies and procedures.
5. Provide technical support remotely or by traveling to customer sites to install, service, or train on TM products and services.
6. Prepare Remote Deposit Capture, Automated Clearing House Maintenance, and Annual Renewals.
7. Track and report sales activities and revenue growth.
8. Educate customers and internal staff on TM products, features, benefits, and best practices.
9. Review and analyze existing and potential customer relationships and refer to the lending or retail department as appropriate.
10. Interface with the Marketing team to promote TM products and support the Bank at community events.
11. Other duties as assigned by manager.

Requirements:

1. Associate degree, preferred in Business, Finance, or related field. Will consider equivalent combination of education and experience in lieu of.



2. Sales experience.
3. 5 years experience in banking and/or related financial field.
4. Ability to travel as needed.

Desired Knowledge, Skills, and Abilities:

1. Previous experience in a Treasury Management role.
2. Knowledgeable of TM products and services.
3. Excellent communication and presentation skills.
4. Strong analytical and problem-solving skills.
5. Ability to read, analyze, and interpret financial reports and legal documents.
6. Troubleshoot systemic problems with all electronic services.
7. Ability to work effectively in an internal/external customer service environment requiring both face-to-face and phone-based support.
8. Skills in building strong working relationships with coworkers, community representatives, and customers.
9. Ability to work independently and prioritize projects.
10. Proficiency with various computer software programs.