



Senior Customer Service Associate

Join a bank that's redefining what community banking looks like. First Resource Bank—headquartered in Exton, PA, and proudly recognized as one of the "Best Places to Work"—is looking for a motivated, full-time Senior Customer Service Associate to join our growing team.

As a Senior Customer Service Associate, you'll be at the heart of our mission: turning everyday transactions into exceptional experiences that build an army of raving fans. You'll handle deposits, withdrawals, check requests, and account maintenance with precision and care, because operational excellence isn't just a priority, it's what makes our growth possible. Beyond the numbers, you'll be a trusted advisor who uncovers banking needs, offers thoughtful solutions, and helps our clients feel genuinely cared for—one conversation, one referral, one review at a time.

Essential functions/responsibilities:

- Greet people promptly, professionally, and invitingly by phone, email, and in person. Cultivate a welcoming environment that is palpable to everyone who walks in the branch
- Interact with people constructively and inclusively
- Intentionally engage people in thoughtful conversation
- Operate a balanced cash teller drawer. Manage cash-in-branch daily so that adequate denominations and amounts are readily available to meet the customers' needs while remaining within limits
- Process account transactions, such as deposits, withdrawals, transfers, and cashier check requests
- Open deposit accounts and ancillary products and services, such as online banking access, debit card, check books
- Assist in onboard all new team members using a methodical and measured approach; focus especially on communicating the "why" behind each written policy, procedure, and initiative to help builds culture, critical thought, knowledge, and skills to help in branch growth
- Take ownership of customer issues and follow through with them until resolution
- Readily and proficiently mentors the Customer Service Representative (CSR) and assists their Customer Service Manager (CSM) in developing the team and is the back up to the manager in their absence
- Perform file maintenance on deposit accounts and customer information files
- Identify and address the root causes of issues to achieve first call resolution

- and prevent issues from reoccurring
- Proactively follow up with people regarding any outstanding action items
- Meet or exceed all deposit growth goals by contributing leads and business opportunities
- Maintain accurate and timely documentation of deposit growth efforts on pipeline worksheet. Make outbound calling efforts to existing customers to strengthen the relationship and participate in pen blitzes to get our name and brand out in the community.
- Speak competently with people about the benefits and usage of all deposit products and services
- Ask pointed questions of people to uncover and understand their banking needs and recommend the appropriate products and services through in-person interactions and outbound calling efforts. Ask open-ended questions to help uncover the root of the situation
- Readily educate people about specific products and services that meet their individual needs
- Maintain operational compliance and excellence by executing all written policies and procedures, with a priority focus on our Security, CIP, and BSA/AML policies and procedures
- Understand the reason behind each policy and procedure that you execute so that you can think critically
- Maintain and review all logs and keep up to date on the retention schedule
- Respectfully question status quo to uncover opportunities to do better
- Make informed suggestions for every problem or opportunity you uncover
- Actively participate in team meetings
- Assist in maintaining and updating existing procedures for accuracy by utilizing your job experiences
- This position is an in-office position and cannot be performed remotely

Competencies:

- Proficient written and verbal communication
- Ability to educate clients on our products and services
- Ability to work a minimum of 2 Saturdays each month
- Welcomes challenges head on, with a positive, fun, team-first attitude
- Flexible schedule and ability to travel
- Proficient in Microsoft office products, particularly Excel and Word
- Experience with Jack Henry and Profit stars systems is preferred
- Active listening, amiability, humility, inquisitiveness, initiative, adaptability, result-orientation
- Active volunteerism in the community is encouraged

Supervisory Responsibilities:

- None

Education and Experience:

- High school diploma or equivalent
- 5+ years of banking experience required
- 5+ years of customer service experience required

Physical Requirements:

- Prolonged periods of sitting at a desk and working on a computer
- Must be able to lift up to 50 pounds at times

First Resource Bank is an Equal Opportunity Employer

Please click on link to apply: <https://recruiting.paylocity.com/recruiting/jobs/All/03c33d56-8789-45c2-bf68-69ba32f70460/First-Resource-Bank>