POSITION DESCRIPTION

Job Title: Operations Agent – Retail Banking
Level: EO

Department: Branch Banking
Reporting To: Branch Operations Manager
Location: Branch

Approved Role: YES / NO For queries pertaining to the approved status contact Compliance Department

Job Purpose:
To understand and provide across the counter service to fulfill customers and non-customers banking needs. Identify any opportunities to cross sell and refer same to the appropriate branch personnel. Process customer transactions in an efficient and timely manner and facilitate use of alternate channels wherever possible.

Area of Responsibility

- Ensure desired & uniform (TCF) level of customer service to the branch customers; whether in front desk or in the teller area. This includes solving the customer queries efficiently, helping them with the alternatives and making sure that bank’s processes and guidelines are followed in the same; within the desired timelines as per bank’s commitment to customers.
- Ensure the rejections in transactions and account opening is kept at the minimum to ensure minimum customer inconvenience and the desired service timelines as communicated to the customer.
- Responsible to follow all the health & safety, operational risk and compliance guidelines in their day-to-day work as per the bank’s policies.
- Meet personal business targets as discussed and communicated by the Branch Manager in the beginning of Financial Year. This will require maintaining and growing book of the assigned customers, do out bound calling and/or, meet clients outside the branch premises to generate further business and referrals.
- Organize and participate in events and play active part in the Sales Promotional activities for the branch. To be proactive and vigilant in query handling, monetary transactions and relationship opening which may give rise to money laundering and other financial malpractices; informing the concerned authorities with detailed report well within the time.
- To undertake projects and assignment from time to time as directed by Supervisor.
- Be adaptive to the change; keen in learning and complying with the new or changed regulations and communications as given by the management time-to-time.

Job Authorities:
- People Related: Interaction with Customer Service Manager, Branch Manager, Personal Bankers and other CSR’s
- Operational Related: Adhere to all policies and procedures for transactional banking, AML and KYC.

Job Requirements/ Specification

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<th>Qualifications</th>
<th>Basic</th>
<th>Professional</th>
<th>Desired</th>
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<tr>
<td>Work Experience</td>
<td>As required by Job</td>
<td>Graduate</td>
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<td></td>
<td>No of Years</td>
<td>Industry</td>
<td>Area of work</td>
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<td></td>
<td>As appropriate for Job</td>
<td>Financial Services</td>
<td>Banking</td>
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Functional Skills
- Knowledge of ICICI banking products and services
- Ability to operate and balance cash on a daily basis
- Knowledge of ICICI banking procedures and processes
- Ability to process financial and non financial transactions (eg. Deposits, withdrawals, remittances, draft, cheque clearing, holds etc.)

Behavioral Skills
- Excellent communication and interpersonal skills
- Ability to multi-task and adapt to any situation or change
- Fast learner, energetic, and results-oriented
- Problem solver with good judgment and cash management skills
- Team player, Details orientation
- Professional, honest and efficient
- Work well under pressure
- Excellent analytical skills and good at Math and basic calculations

I have read and understood the above: signed…………………………………..

Emp Name: Emp No: Date: