

WBA Management Development Program

The Performance Management Process: Selecting, Developing, and Retaining Stars

Pre-work exercise 1: Assessment

(Please complete by Friday, July 17)

In our COVID affected world, new methods are being used to screen and evaluate applicants. As a part of our work on screening and selection, I want to show you some new technologies that are emerging.

Please take this 30 – 45 minute assessment exercise – the results will be confidentially shared before we get together virtually, to be used in mapping against a job description. It uses the TalentSorter tool, a normed psychometric assessment

Ctrl+Click on this <https://bit.ly/31Wlvsd>

or cut and paste it in your browser.

Pre-work exercise 2: Open position description for hiring

(Please submit your completed Position Description to sherry@wabankers.com by noon on Thursday, July 16 with the naming convention LastName, FirstName-MDP-July 22.)

Engagement is a mix of good leadership and people that fit their jobs. In preparation for our discussion on Selecting, Developing and Retaining Stars, **this exercise has you selecting a challenging position in your organization, and writing a fresh open position description** with both the duties of the job listed, along with describing some of the culture and values of your bank. This will be a practical and insightful exercise that should produce a useful result.

Your task:

1. **Select a position that is a challenge to engage and retain employees. If there is none that comes to mind, select one that is a “key position” for the future of the organization, one of high importance to the sustainability of the bank.**
2. **Think through a simple Job Description for the position, including**
 - ◆ **Job Duties (“What you do”)**
 - ◆ **Performance Standards (“How you do it”)**
 - ◆ **Job Factors**
3. **Read through your bank’s values or mission statement, and think through the overall “culture” of your bank**

Create an open position posting that could be used in a local job board or recruiting site, and add a little “pizazz” to make it stand out and attract the attention of the kind of applicant that would be a high performer at that position for your bank.

I’m expecting a description of at least 75 words, but since it’s the internet the length can be as long as you wish.

In our session, we will have a contest for the most effective advertisements, and prizes will be given!

Here is some further instruction, taken from the Indeed.com job posting site:

Our small but growing bank needs detail-oriented Bank Tellers to join our high quality staff. We’re looking for self-starters who can take the initiative when responding to customer concerns and complaints. The ideal candidate will have a friendly personality and a head for numbers. They should understand the roles that banks serve in the community and have a customer-focused attitude. We promote from within, so potential career paths could include personal banking, lending and other departments within the bank.

Bank Teller job title

A great job title typically includes a general term, level of experience and any special requirements. The general term will optimize your job title to show up in a general search for jobs of the same nature. The level of experience will help you attract the most qualified applicants by outlining the amount of responsibility and prior knowledge required.

Examples of Bank Teller job titles

- Bank Teller
- Supervisory Bank Teller
- Bank Teller (2+ Years’ Cash Handling Experience)
- Bank Teller (Part-Time)
- Teller

Bank Teller job summary

A great job description starts with a compelling summary of the position and its role within your bank. Your summary should provide an overview of your bank and expectations for the position. Outline the types of activities and responsibilities required for the job so job seekers can determine if they are qualified, or if the job is a good fit.

Example of a Bank Teller job summary

Our small but growing bank needs detail-oriented Bank Tellers to join our exemplary staff. We're looking for self-starters who can take the initiative when responding to customer concerns and complaints. The ideal candidate will have a friendly personality and a head for numbers. He or she should understand the roles that banks serve in the community and have a customer-focused attitude. We promote from within, so potential career paths could include personal banking, lending and other departments within the bank.

Bank Teller responsibilities and duties

The responsibilities and duties section is the most important part of the job description. Here you should outline the functions this position will perform on a regular basis, how the job functions within the organization and who the job reports to.

Examples of Bank Teller responsibilities

- Greet customers when they arrive and direct them to the appropriate station within the credit union
- Process deposits, withdrawals and other banking transactions for a high volume of customers
- Sell or redeem savings bonds and other financial instruments
- Perform account maintenance for members who want to change their banking products
- Open and close accounts as required for members
- Introduce new members to the platform and assist them with any balance transfers or other transactions
- Learn and follow the credit union's operating procedures as outlined in the employee handbook

Bank Teller qualifications and skills

Next, outline the required and preferred skills for your position. This may include education, previous job experience, certifications and technical skills. You may also include soft skills and personality traits that you envision for a successful hire. While it may be tempting to include a long list of skills and requirements, including too many could dissuade qualified candidates from applying. Keep your list of qualifications concise, but provide enough detail with relevant keywords and terms.

Examples of Bank Teller skills

- 5+ years' cash handling experience in a banking or retail setting
- 1+ years' bank or credit union experience preferred
- Bachelor's degree or an additional 4+ years banking experience
- Strong math and logic skills
- Exemplary organizational, problem-solving and communication skills
- Advanced customer service skills
- Ability to follow precise directions and learn banking equipment and software quickly
- Working knowledge of foreign currency

Again, your task is to: **Create an open position posting that could be used in a local job board or recruiting site, and add a little “pizazz” to make it stand out and attract the attention of the kind of applicant that would be a high performer at that position for your bank.**

If you have any questions, please call me directly at 317-250-9081 or email at karl@expertspeaks.com. Looking forward to seeing you (virtually) soon!