



Position Title: Treasury Sales Officer

FLSA Class: Exempt

Job Description

The Treasury Management Sales Officer is responsible for effectively selling the Bank's depository and treasury management services to existing and prospective clients, either in conjunction with Relationship Managers or on an individual basis, achieving deposit and fee income goals and solidifying customer retention efforts by providing a superior level of relationship management and customer service.

This position contacts prospective customers in order to develop new treasury management business. Manages relationships with existing customers to ensure proper servicing of accounts and to expand existing business. Prepares sales presentations, explains services offered, and recommends services which would benefit clients. Identifies opportunities to cross-sell other products and services. Assists management in developing a market strategy and in setting sales objectives. Meets or exceeds set deposit goals. Assists in the design and ensures the proper installation of treasury management services. Assists management in the development of new services or the modification of existing services.

Must be a team player, have the ability to work under pressure, have a professional image and be able to resolve problems and conflicts. Must possess strong and advanced business communications skills such as advanced writing, listening, delivering sales proposals, and have basic office and mathematics skills, and customer service skills. Possession of professional skills such as report writing, basic statistics, effective presentation skills and creative skills are required.

The successful candidate will be able to:

- Achieve/exceed key objectives and goals in, business development, client retention, deposit growth, portfolio quality, fee income, cross sales, referrals, client satisfaction, and knowledge of comprehensive cash management solutions. Proven track record for developing new sales, closing sales and achieving annual objectives for cash management sales goals, fee income generation (Non-II), cross sales and referrals.
- Call on new and existing commercial clients to develop and close cash management sales business. Proactively review assigned client base and identifies deposit and cash management services solutions and cross-sale opportunities based on customer needs and completes the sale. Refers and engages business partners (i.e. commercial lending, branches, wealth management, etc.), as appropriate.
- Develop treasury management sales proposals and pricing pro formas for prospective and existing clients to further develop and strengthen business relationships.
- Conduct annual cash management reviews for top tier commercial clients.
- Maintain up to date and thorough knowledge of cash management sales programs, products and services, as well as applicable federal and state regulatory and compliance requirements.

- Serve as the internal Bank expert for treasury management products and services, delivers internal cash management presentations, and actively participates in sales meetings, joint call planning and prospect development, in partnership with region's commercial lending and branch calling officers.
- Partner with commercial lenders in pre-proposal discussions to fully understand client needs and shape preferred solutions.
- Actively participate in joint client and prospect calls and presentations with commercial lenders and branch sales officers to further business development and sales efforts; leads cash management discussions with clients and prospects, identifying and assessing client needs and challenges and communicating features/benefits of Bank programs, cash management products and services.
- Prepare contracts and implementation documentation, in accordance with all account opening, account ownership verification and cash management services set-up processes; reviews and checks documents for completeness, accuracy and conformance with applicable rules/regulations and procedural requirements.
- Directly responsible for managing and retention of client's operating business by ensuring client satisfaction
- Provides an exceptional level of quality service for internal and external customers.
- Ability to thoroughly assess customer needs and understand customer requirements, translating into sales deliverables across a wide array of cash management products and technologies.
- Proven ability to develop and maintain open, professional, positive and productive relationships; demonstrate cooperative behavior with management, business partners, customers and co-workers, and work effectively as a team member.
- Detailed functional and technical knowledge of existing and developing cash management services, documentation and internet technologies.
- In-depth working knowledge of all products, services and programs; with demonstrated sales and business development skills.
- Strong ability to maintain and manage personal composure when confronted with a difficult situation and/or customer, with the ability to provide information, data, advice and solutions, as well as gain trust and respect.
- Excellent listening, verbal, written and business communication skills, delivered in person, via phone or email, including effective questioning strategies, negotiations skills, presentation techniques and training delivery skills; with the ability to read, write, speak and understand English well.
- Demonstrated organizational and time management skills with the ability to effectively multitask, complete assignments and meet deadlines in a timely manner.
- Ability to work independently, under limited direction/supervision, exercising independent judgment, referencing available resources, and demonstrating a high level of accuracy and attention to detail.
- Unquestionable integrity and demonstrated ability to maintain confidentiality in handling sensitive and confidential information required.

- Maintains in-depth knowledge and ensures compliance with applicable regulatory requirements, and follows all Bank policies, procedures and guidelines.
- Advanced PC experience using MS Office products (Word, Excel, Outlook, Adobe), with the ability to adapt to learn and support new products and technologies quickly.

JOB REQUIREMENTS

Basic Qualifications

- Bachelor's degree, or equivalent work experience
- 10 or more years of sales experience in the commercial banking industry
- History of meeting and exceeding deposit and revenue goals
- CTP strongly preferred

Preferred Skills/Experience

- Superior knowledge of treasury management products
- Expert sales and new business development skills
- Excellent customer service/relations skills
- Excellent presentation, verbal and written communication skills

Compliance Accountability:

- Responsible for compliance with all regulations, laws, and bank policies and procedures that pertain to your day-to-day job responsibilities.
- Responsible for maintaining a working knowledge of all compliance regulations pertinent to your assigned duties by successful completion of any courses assigned on a timely basis.
- Responsible for adherence to BrandBank's Code of Professional Ethics and Conduct as well as observing and promoting compliance with the Code among fellow bank personnel, customers, and vendors.

BrandBank is an Equal Employment Opportunity (EEO) employer and welcomes all qualified applicants.

Applicants will receive fair and impartial consideration without regard to race, sex, color, religion, national origin, age, disability, veteran status, genetic data, or religion or other legally protected status.

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