

SALES MANAGER

Department: Retail
FLSA Classification: Exempt
Revision Date: November 2025

The Sales Manager develops and maintains customer and business relationships within the Branch market to increase depository relationships and customer utilization of additional Bank products and services. This role oversees general operations of the Branch, ensuring commitment by all Branch staff to exceptional and efficient customer service, effective team relations, and strong leadership. Also responsible for supervision and support of all Branch operational and customer service functions.

Essential Functions

- Develops and maintains customer and business relationships within Branch market.
- Makes customer calls with a focus on new business development, customer retention and exceptional customer service. Solicits new depository relationships and cross-sells bank products and services to existing deposit relationships.
- Participates in civic/community events and other opportunities for community engagement. Coordinates Bank events such as open houses, holiday events, and other promotional events.
- Coordinates staff schedules, ensuring adequate and efficient branch coverage, capable of meeting business growth expectations and customer service standards.
- Demonstrates and cultivates exceptional customer service skills. Ensures Bank expectations for customer service are met by all staff members.
- Identifies, coordinates and implements training and development opportunities for staff members.
- Demonstrates and communicates the Bank's commitment to a culture of professionalism, compliance, and high ethical standards. Maintains high standards of integrity and respect.
- Responsible for training, coaching, performance feedback, and addressing personnel matters of all assigned staff members.
- Assists Personal Bankers during peak hours. Provides backup coverage to other Branch retail positions when necessary.
- Receives incoming bank visitors and directs them appropriately. Answers and assists incoming callers with questions and requests.
- Ensures branch compliance with Bank policies, procedures, practices, and all Federal banking regulations, promptly communicating all applicable updates and changes to branch staff members.
- Maintains safeguard of the Bank's assets and security of the working environment, including enforcement of dual control procedures and oversees teller and vault cash levels.

Supervisory Responsibilities

- Responsible for leadership and supervision of all assigned staff members, including scheduling, evaluations, and managing personnel issues.
- Oversee branch workflow, ensuring timely and accurate completion of all duties assigned.

Competencies

- Ability to effectively carry out Bank customer service and sales standard processes and achieve necessary goals.
- Strong supervisory and leadership skills; able to effectively lead, mentor, train, and handle disciplinary matters.
- Extensive knowledge of bank policies, procedures and practices and applicable laws and regulations.
- Excellent communication skills verbal and written.
- Ability to maintain strict confidentiality and handle sensitive financial information.

SALES MANAGER*(page 2)*

- Proven time management and organizational skills; able to effectively handle multiple priorities and adapt effectively as pace and business needs fluctuate.
- Ability to effectively and efficiently learn Bank software.
- Strong working knowledge of Microsoft Word, Excel, PowerPoint, and Adobe Acrobat.

Physical Demands

The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is frequently required to stand or sit; kneel, stoop, or squat; use hands or fingers to handle or feel objects, tools or controls; reach with hands and arms; and talk or hear. The employee is occasionally required to walk. The employee must occasionally lift and /or move up to 25 pounds. Specific vision abilities required by this job include close vision, peripheral vision, depth perception and the ability to focus.

Work Environment

The Bank's professional working environment requires employees to communicate effectively, both verbally and in writing. Employees must demonstrate strong interpersonal skills when working closely with internal business partners and external clients. Employees may be exposed to confidential and propriety information within the working environment, therefore, must always uphold confidentiality. Due to the possibility of being exposed to high-risk situations (i.e. robbery), detailed instructions and procedures are required to be followed at all times to safeguard the Bank's employees, customers, and assets.

Travel

- Occasional travel to other Bank facilities. Additional travel to non-Bank facilities for community engagement activities, professional development opportunities, and other events.

Required Education and Experience

- High school diploma or equivalent required. College education preferred.
- Minimum of 3 years' experience in banking or related field; 5 years preferred
- Strong dedication and motivation to achieving sales, service, operational results, and exceeding expectations.

This job description is a general description of the types of responsibilities that are required of an individual in this job. It is not intended to cover or contain a comprehensive listing of all duties, responsibilities or activities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

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