

# **Bank Branch Manager Competencies and Behaviors**

## **1. Managing People**

Makes his/her performance expectations clear, and holds others accountable for meeting challenging work standards for production, accuracy and completion.

Creates a positive environment that fosters acceptance and tolerance, and in which all employees work hard, contribute ideas and feel free to ask for help.

Models how to build and maintain positive working relationships; creates a strong feeling of belonging and cohesion within the branch.

Willingly and proactively coaches others to achieve better results and upgrade skill sets; tries multiple approaches to maximize others' learning.

Sets branch accountabilities and delivers ongoing directional feedback.

Is a champion of organizational change initiatives; embraces change and sets the tone for the branch.

Provides for employee training to upgrade skills and increase banking, service and product knowledge.

Influences and inspires others; serves as a mentor; supports development; shares in wins and successes.

Assigns responsibilities, delegates and empowers others, removes obstacles, supplies needed resources, and monitors others' progress.

Carefully observes and evaluates the capabilities of employees and assigns them to appropriate roles within the branch; recognizes, builds, and leverages diversity of skills, ideas and personalities within the branch.

Pays attention to what motivates people and inspires high performance by appealing to individuals' motivational preferences.

Accurately recognizes each individual's strengths and performance gaps and takes action to leverage strengths, and build skills in gap areas.

Values and nurtures self-confidence and courage in others; develops successors and talent pools.

Communicates the achievements of his/her group to upper management; vigorously supports his/her people.

Fosters an environment focused on problem-solving and truth, rather than blaming and secrecy.

Creates strong morale and team spirit through frequent reinforcement, shared activities and on-going communication

Creates imaginative and effective incentives for top performance.

Redirects or corrects others behavior that runs counter to the good of the team.

Discourages “we” vs. “they” thinking; values the contributions of everyone; acknowledges and celebrates team accomplishments.

## **2. Functional / Technical Knowledge**

Identifies future issues that may impact business

Demonstrates a thorough knowledge of how his/her branch performance impacts overall company results.

Has comprehensive knowledge of the branch’s operations and performance and uses this knowledge to ensure that processes are in place to measure and monitor operational and financial effectiveness.

Adds value by utilizing broad-based knowledge of the industry and awareness of current and past business trends.

Understands the company and the industry and has a feel for what makes for a competitive edge.

Leads others by example by continuously acquiring new knowledge and proactively sharing knowledge.

Uses broad operational knowledge to resolve the most difficult and complex customer issues.

Understands workflow and operations within the work unit, as well as functions of units from which work is received and to which work is delivered.

Knows what it takes to be successful in the industry and has thorough knowledge of the industry’s history and growing patterns.

Relies on staff to fill-in and help with some functional knowledge; is willing to admit that he/she doesn’t know it all and asks for help and information, as needed.

Shares his/her functional and technical knowledge with others as a way for them to learn and grow; doesn't "hoard" knowledge for personal gain, or power.

Reads widely to be in touch with trends and information useful to his/her role.

### **3. Decision-making**

Acts quickly and decisively, when needed.

Makes day-to-day decisions to support long-term organizational goals.

Considers new business opportunities and how to capitalize on them

Considers others' input and feedback in making important decisions.

Assumes full responsibility for his/her decisions, even when unpopular; has the backbone to work through negativity from others.

Takes accountability for branch performance; corrects problems without blaming others.

Makes high-quality decisions based on a mixture of analysis, wisdom, experience and judgment; takes the time needed to build a solid business case for important decisions.

Empowers employees to make appropriate on-the-spot decisions; delegates effectively.

Brainstorms for creative solutions.

Looks to future trends in arriving at important decisions; consults with others to get fresh perspectives and new data points.

Seeks out and integrates divergent views to make balanced and intelligent decisions.

### **4. Communications**

Candidly and tactfully discusses individual performance; doesn't hold back what needs to be said; lets people know where they stand.

Communicates the impact of strategic change efforts in a way that makes the vision real for everyone.

Proactively communicates the company and branch's purpose, business model and the specific behaviors needed for success.

Encourages others to communicate in group settings.

Discloses important information to his/her team openly and actively; practices open and honest communication to build trust; balances “need to know” with open communication.

Delivers tough news without delay and with sensitivity, and without overly “sugar-coating” difficult realities.

Conducts one-on-one meetings to motivate and better understand staff members

Creates a supportive and tolerant work environment; encourages idea sharing, open communication and diversity of opinion.

Maintains two-way dialogue with others.

Communicates empathy and compassion for people in trouble or under stress.

Deals with performance problems quickly and firmly; maintains the self-esteem of others.

Builds bridges, manages conflict and finds common ground to bring people together to achieve impressive results, despite significant differences.

Accepts feedback non-defensively; seeks feedback to stay on track; views negative feedback as information for improvement.

Listens attentively to others; takes care not to interrupt.

Communicates directly and clearly; guards against the overuse of jargon.

Openly asks others for feedback as a way of actively working on improvements.

Asks for, and wants to hear, the truth, even when the truth is hard to hear; doesn't take negative feedback personally; focuses on the issue, not the person.

Asks questions and builds upon employees' ideas; Is able to listen well and take direction from those closer to the work.

## **5. Innovation and Risking**

Challenges others to take smart risks.

Gives consideration to novel, viable alternatives, instead of holding on too long to tried-and-true methods; fosters change and innovation to continuously invigorate the branch and motivate staff.

Translates changing customer needs into opportunities for new service or product development.

Is skilled at broadening roles to encourage competency development and appropriate risk-taking.

Encourages others to develop innovative ideas; pushes employees to come up with new plans and strategies on their own.

Experiments frequently as a means of learning, adapting and improving products and services.

Accepts that mistakes can happen when risk-taking occurs; treats mistakes as learning opportunities.

Weighs caution with courage and analyzes the potential danger a particular risk could pose before acting.

## **6. Networking / Sales**

Highly values relationships; is very effective at getting people to reveal their dreams, values and feelings in conversation.

Is generous of spirit and giving as a person; gives without an expectation of reciprocity.

Actively builds a solid network within and outside the company; values relationships highly; is trusted and well-liked by others.

Is skilled at building external alliances that benefit the branch and company.

Is able to leverage his/her excellent interpersonal skills to mediate problems, as these arise.

Uses a variety of styles, depending on the situation.

Works hard to build positive relationships where none had existed before.

Projects strong self-confidence; compels others to respect and trust him/her.

Negotiates and influences successfully when there are opposing views.

Relates personal experiences to establish rapport.

Recognizes and acts upon opportunities to build relationships by helping people connect with others, offering information, sharing resources, etc.

Determines the most opportune time for events and interactions; lets others in on how they will personally benefit from his/her ideas.

Negotiates skillfully to create the best possible outcome for both parties; pursues negotiations in a sincere and open manner.

Enjoys shaping the ideas and opinions of others.

Sets an example for aggressive, but ethical, sales methods / techniques.

Builds strong relationships with a diverse customer base.

Recognizes sales talent in others and nurtures and develops that talent

Promotes the company in ways that foster goodwill and build profitability.

## **7. Persistent and Results-Oriented**

Accepts personal responsibility for the work of the team

Presses to expedite action and meet deadlines and financial targets

Takes action to meet and exceed expectations

Seizes opportunities when these arise; is full of energy for new ventures

Is comfortable with primary accountability for business results; understands that with accountability comes pressure.

Holds subordinate managers and supervisors accountable for bottom-line results

Pursues his/her goals with energy, drive and a need to finish; perseveres in the face of adversity; doesn't let barriers or set-backs get him or her down.

Is committed to continuous improvement through empowerment and management by data.

## **8. Analytical / Planning / Detail-oriented**

Has an “eye” for detail; spots mistakes, incomplete, or faulty work before it becomes a problem.

Takes the time necessary to check work carefully before it goes out.

Knows when to stress strong attention to detail with employees

Recognizes the value that high attention to detail brings to the company.

Builds quality checks into processes.

Analyzes what went wrong when deadlines are missed, or the numbers fall short.

Develops fully actionable plans that successfully respond to identified issues

Coordinates team effort and action to meet plans

Creates thorough implementation plans that include back-end checks for quality and accuracy.

Demonstrates a collaborative problem-solving style.

Analyzes business and service problems from a systemic perspective; seeks long-term solutions that will fix the problem, rather than just surface issues.

Separates what needs to be done by mission-critical vs. important or routine; understands and conveys priorities to branch staff.

Is resourceful; knows how to “do-more-with-less”, and is creative about finding ways to meet targets when challenged.

## **9. Customer Focused**

Anticipates customer needs and creates services to meet those needs

Structures work processes to be customer-friendly and responsive

Strives to please the customer, but not at too high a price; doesn’t “give away the store” too easily, and keeps business goals uppermost in mind.

Recognizes and rewards employees who provide consistently excellent customer service.

Provides the staff with current customer feedback and initiates corrective action to fix problems.

Uses customer knowledge to coach and develop staff on how to optimize service delivery.

Helps customer better articulate their needs; is skilled at handling unique or complex customer requests, issues, or needs.

Creates a branch environment that is highly personal, distinctive, interactive and satisfying for customers and teaches others to do the same.

Meets with frontline people to discuss how to be more supportive of their efforts with customers.

Sets appropriate service standards and develops mechanisms for ongoing evaluation of service effectiveness.

## **10. Ethics**

Models integrity; coaches others well in issues involving honesty and ethics.

Proactively rewards positive behavior and deters questionable, or borderline ethical behavior that is not in the company's long-term interests.

Faces difficult ethical issues head-on; keeps the company's best interests foremost in mind.

Takes personal responsibility for communicating ethical standards of behavior for all branch employees.

Takes ethical and legal risks seriously; uses performance and communications systems to reduce the company's vulnerability.

Creates a strong "employer brand" based on sound business ethics to attract the highest quality employees.

Values honesty over results; is an active participant in building a company culture based on solid business ethics; ensures that all staff are highly aware of what behavior is in bound and out of bounds.