

Financial Services Entry Level Opportunities – Common Skills/Competencies Matrix

(Updated as of 8-8-03)

Common Skills/Competencies

Core Skills & Competencies Required	Admin Assistant	Branch Consumer Banking Rep. (Platform)	Branch Sales & Service Rep. (Universal)	Branch Customer Service Rep. (Teller)	Call Center Representative	Claims Processor	Collector	Consumer Lending Processor	Data Entry Clerk	Data Processor	Lock Box Clerk	Proof Operator
Adaptability	✓	✓	✓	✓	✓	✓	✓	✓		✓		
Analytical Skills/Problem Solving	✓	✓	✓	✓	✓	✓				✓	✓	
Attention to Detail	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Basic Math Skills/Math Aptitude	✓				✓		✓		✓		✓	✓
Advanced Math Skills/Math Aptitude		✓	✓	✓		✓		✓		✓		
Cash Handling			✓	✓								
Oral Communications	✓	✓	✓	✓	✓		✓	✓		✓		
Written Communication Skills	✓				✓		✓					
Customer Service Orientation	✓	✓	✓	✓	✓		✓			✓		
Data Entry Skills - Key Board – Alpha Numeric - Numerical Data Entry (10-key adding machine, calculator)		✓	✓	✓				✓	✓		✓	✓
Environment - the ability to work in a high pace, deadline oriented environment	✓				✓	✓	✓	✓	✓	✓	✓	✓
Multi-tasking	✓	✓	✓	✓	✓			✓				
Organizational Skills	✓	✓	✓		✓			✓				
PC literate Spreadsheet Applications	✓ ✓	✓	✓	✓	✓	✓	✓	✓ ✓		✓ ✓	✓	
Sales/Referrals		✓	✓	✓	✓							
Operate Standard Office Equipment	✓	✓	✓	✓							✓	
Team Work	✓	✓	✓	✓	✓	✓		✓		✓		
Time Management	✓	✓	✓		✓			✓		✓		

Behavioral Requirements

Behaviors	Admin Assistant	Branch Consumer Banking Rep. (Platform)	Branch Sales & Service Rep. (Universal)	Branch Customer Service Rep. (Teller)	Call Center Representative	Claims Processor	Collector	Consumer Lending Processor	Data Entry Clerk	Data Processor	Lock Box Clerk	Proof Operator
Attitude (<i>Cooperative, Positive, Professional</i>)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Compliance (<i>ethics, policies & procedures, etc.</i>)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Physical Requirements - Lifting - Standing on feet for long periods of time			✓ ✓	✓ ✓					✓		✓	

Education Requirements

Education	Admin Assistant	Branch Consumer Banking Rep. (Platform)	Branch Sales & Service Rep. (Universal)	Branch Customer Service Rep. (Teller)	Call Center Representative	Claims Processor	Collector	Consumer Lending Processor	Data Entry Clerk *	Data Processor	Lock Box Clerk	Proof Operator *
- High School/GED	✓	✓	✓	✓	✓	✓	✓	✓		✓		
- Post Secondary Degree preferred	✓				✓							
- Equivalent exp.	✓	✓	✓	✓	✓					✓		

**Baseline keystroke performance requirement within a specified period of time.*

Terminations

Involuntary/Voluntary Reasons for Termination
Resign without notice
Career opportunity/change
Attendance (absenteeism, tardiness, failure to report for work)
Violation of Policy/not following procedures
Performance
Misconduct
Lack of Advancement
Prefer full time work
Dissatisfied with Work; Environment; Unresolved issues
Personal
Relocation
Left for Higher Pay
Dependent/House Care issues

Hiring Process Selection Criteria (e.g. Drug Testing, Fingerprinting, Credit Check, etc.)

- 1) Pre-employment skills assessment
- 2) Interview with recruiter and hiring manager
- 3) Background Check (criminal and Social Security verification)
- 4) Drug test
- 5) Fingerprinting
- 6) PI – Profile used for leadership, outgoingness, patience, analytical abilities. Look at against position profile. Used as merely a Guideline for compatibility of position.
- 7) Pre-employment assessments done at interview.
- 8) Additional leadership and sales effectiveness added for management or sales positions.