

Ada Wilson



Job Title

Community Banker

Age

25 to 34 years

Highest Level of Education

Associate degree (e.g. AA, AS)

Social Networks



Industry

Bank

Organization Size

11-50 employees

Preferred Method of Communication

- Phone
- Email
- Face-To-face

Tools They Need to Do Their Job

- Accounting and Bookkeeping Systems
- Content Management Systems
- Cloud-Based Storage & File Sharing Applications
- Word Processing Programs
- Business Intelligence Dashboards
- Reporting Software
- Invoicing Software
- Email
- Employee Scheduling Software

Job Responsibilities

Handles customer requests through email and phone including password resets, ACH and other documentation

Their Job Is Measured By

Opens a variety of new accounts for clients including checking, savings, IRA, CD, etc

Reports to

Bank Manager

Goals or Objectives

Help customers that come to the bank

They Gain Information By

Work Email

Biggest Challenges

- Navigating Client Relationships & Communications
- Communication
- Problem Solving & Decision Making
- Collaboration & Creativity
- Resources