

Job Description Template for LOAN OFFICER

Job Title: Loan Officer

Industry: [Insert Industry – e.g., BFSI, ITeS, Healthcare, etc.]

Location: [Insert Location]

Salary Range: [Insert Salary]

Department: [Insert Department]

Work Hour Allocation: [Insert Details]

POSITION OVERVIEW

We are seeking a Bank Customer Advisor to provide personalized banking services, assist with account operations, and ensure a seamless customer experience. This role involves direct interaction with clients and delivering tailored financial guidance.

ABOUT THE ORGANIZATION

[Insert Company Name] is a [Insert Industry-Specific Description] institution committed to delivering superior customer service and banking convenience through personalized advisory support and product recommendations.

Level of Experience / Expertise Requirements

(Use as per requirement)

- **Entry Level (0–2 years):** Assist with routine banking transactions and basic product queries.
- **Mid-Level (3–5 years):** Guide customers on financial solutions and open/manage accounts.
- **Senior Level (6+ years):** Manage premium accounts, provide strategic advisory, and lead customer service initiatives.

JOB PROFILE SPECIFIC QUALIFICATION

(Add more if required)

- Bachelor's degree in Banking, Finance, or related discipline
- Strong interpersonal and product knowledge skills
- Familiarity with banking CRM and customer engagement tools

ROLES AND RESPONSIBILITIES

(Use as per level of expertise you require)

- Greet clients and provide product/service information (Entry Level)
- Assist with account openings and transactions (Entry Level)
- Resolve customer issues and respond to inquiries (Mid-Level)
- Recommend banking solutions based on client needs (Mid-Level)
- Maintain client portfolios and ensure satisfaction (Mid-Level)
- Offer financial advisory services and promote cross-selling (Senior Level)
- Support branch campaigns and relationship-building activities (Senior Level)
- Handle escalated concerns and support service quality improvement (Senior Level)

Skills Required (Technical + Behavioral):

- Customer service and communication
- Banking product knowledge
- Active listening and empathy
- CRM proficiency
- Teamwork and service orientation

ABOUT PMAPS

PMaps is India's leading visual-based talent assessment platform, offering 500+ job-specific psychometric assessments, AI-powered interview tools, and seamless integrations with leading ATS and LMS systems. Trusted by top organizations, we help you hire smarter, reduce hiring time by up to 75%, and cut hiring costs by up to 65%.

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