

Job Description Template for RETAIL BANKER

Job Title: Retail Banker

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 Retail Banker to assist clients with a range of financial services, including account management, loans, and investment options. This role involves building strong relationships with clients, delivering exceptional customer service, and offering tailored banking solutions that meet the financial needs of individual clients.

ABOUT THE ORGANIZATION

[Insert Company Name] is a [Insert Industry-Specific Description] institution committed to providing high-quality, customer-focused financial services. We prioritize the satisfaction of our customers and aim to deliver reliable and innovative solutions for their banking needs.

Level of Experience / Expertise Requirements

(Use as per requirement)

- **Entry Level (0–2 years):** Assist with account openings, deposits, withdrawals, and customer queries.
- **Mid-Level (3–5 years):** Manage client portfolios, offer financial products, and conduct needs assessments.
- **Senior Level (6+ years):** Lead sales initiatives, manage high-value client relationships, and drive business development.

JOB PROFILE SPECIFIC QUALIFICATION

(Add more if required)

- Bachelor's degree in Business, Finance, or related field
- Knowledge of banking products and services (loans, mortgages, investment products)
- Excellent communication and customer service skills

ROLES AND RESPONSIBILITIES

(Use as per level of expertise you require)

- Assist customers with opening and managing bank accounts (Entry Level)
- Process routine transactions such as deposits, withdrawals, and transfers (Entry Level)
- Educate customers on bank products and services (Mid-Level)
- Recommend financial solutions tailored to customer needs (Mid-Level)
- Build and maintain strong relationships with clients to promote long-term loyalty (Mid-Level)
- Drive business growth by meeting sales targets for banking products (Senior Level)
- Handle more complex client inquiries and issues, providing personalized financial advice (Senior Level)
- Oversee compliance with internal policies and regulatory requirements (Senior Level)

Skills Required (Technical + Behavioral):

- Strong customer service orientation
- Knowledge of financial products and services
- Excellent communication and interpersonal skills
- Ability to assess client needs and recommend suitable banking products

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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