



Client Experience Manager

Job Classification: Full-Time, Exempt

Reports to: SVP/ Deposit Operations Manager

Position Summary

The Client Experience Manager leads the daily operations of the bank's Call Center and all customer-facing service channels, including phone, secure messaging and email. This role is responsible for delivering consistent, high-quality client experience that supports the bank's service standards, regulatory requirements, and growth objectives.

Through leadership, coaching, and performance management, the manager develops a high-performing team focused on professional, accurate, and efficient client interactions. By monitoring key performance metrics, optimizing workflows, and partnering across departments, this position ensures seamless service delivery, resolves escalations, and drives continuous improvements that enhance client satisfaction, retention, and overall relationship value.

Principal Duties and Responsibilities

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills and/or abilities required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

1. **Oversee daily operations** of the Client Experience/Contact Center, including all customer-facing channels such as call center, secure messaging, email. Implement and develop client contact channels to include chat, video and Interactive Teller Machines (ITMs), ensuring high-quality service delivery aligned with TNB standards
2. **Build and lead a high-performing client experience team**, establishing clear roles, accountability, and performance expectations that support the bank's service and growth objectives.
3. **Partner cross-functionally** with Frontline, Lending, Mortgage, and Deposit Operations to ensure a seamless, consistent, and positive customer journey across all touchpoints.
4. **Lead, coach, and mentor staff**, providing ongoing performance feedback. Work directly with Team One training on banking products/services, and development opportunities to enhance service excellence and ensure regulatory knowledge.
5. **Design and manage a Quality Assurance program** that ensures consistent adherence to service standards, regulatory requirements (e.g., Reg E, BSA/AML, UDAAP), and internal policies.

6. **Develop and maintain Client Experience procedures**, standardizing practices, scripting, service protocols, and communication guidelines to ensure accurate, compliant, and consistent messaging across all channels.
7. **Serve as the voice of the customer**, gathering feedback and insights to drive improvements, identify trends, improve processes, and enhance customer satisfaction and retention across the organization.
8. **Handled escalated client concerns with empathy and professionalism**, demonstrating strong problem-solving skills, and timely resolutions turning challenges into opportunities that build client trust and loyalty.
9. **Drive employee engagement and recognition initiatives**, reinforcing a culture of excellence, accountability, and appreciation aligned with the bank's values.
10. **Analyze contact center performance metrics** (e.g., call volume, service levels, wait times, first-call resolution, customer satisfaction scores), preparing actionable reports and dashboards for executive leadership.
11. **Establish and execute strategic goals and action plans** for the department, aligned with the bank's overall objectives, including service quality, operational efficiency, and customer growth.
12. **Ensure full compliance** with all applicable federal and state regulations, internal controls, and audit requirements, maintaining strong risk management and documentation practices.
13. **Support additional initiatives and projects** as assigned by senior leadership, including system implementations, digital channel enhancements, and customer experience transformation efforts.

Education and Experience Requirements

- A self-starting individual who possesses a High School Diploma or equivalent
- Call Center Manager certification preferred
- A minimum of five (5) years of banking experience is required, with two (2) years of operational management and leadership experience preferred
- Prior call center or customer service management experience; banking or financial services experience is a plus
- Strong leadership, communication, and problem-solving abilities; proficiency in customer relationship management (CRM) systems
- Ability to work in a fast-paced, customer-focused environment; adapt to fluctuating call volumes and new technologies
- Strong conflict resolution abilities to support positive outcomes
- Proficient in Microsoft applications
- Effective communication skills, written and verbal

Work Environment

This role involves a combination of office, branch, and on-location work. Occasional evening or weekend work may be required for events and special projects.

Training Requirements

All employees are required to attend scheduled mandatory trainings and complete online regulatory compliance training courses applicable to their specific job function. In all situations, employees must ensure that their actions fully comply with all federal banking

laws and regulations, including internal bank policies and procedures. Failure to adhere to these requirements will be grounds for disciplinary action, including probation and possible termination.

Community Involvement

Texas National Bank's Mission Statement includes a commitment to helping our communities grow by serving them with pride and integrity. All employees are encouraged to volunteer for bank sponsored activities, civic, charitable and community events and to be active in the communities we serve.

Management reserves the right to change this position description at any time according to business needs.

Our Hiring Philosophy:

Texas National Bank recognizes that the quality of our people is the foundation for our success. Attracting individuals who value a challenging work environment that rewards the contributions of its people is the cornerstone of our hiring philosophy. It is the policy of Texas National Bank to provide equal employment opportunities (EEO) to all persons regardless of age, race, sex, religion, national origin, handicap, marital status, or other attributes not pertinent to the job requirements. This policy reflects our practice of making all employment decisions, from recruitment to promotions, based on an individual's qualifications without discrimination on any basis.