



## SUMMITBANK

**TITLE:** Market Development Officer  
**REPORTS TO:** SVP, Commercial Banking Team Leader  
**FLSA:** Exempt  
**CATEGORY:** Full Time

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### SUMMARY

**The Market Development Officer reports to the SVP, Commercial Banking Team Leader and is responsible for: Generating revenue by acquiring new deposits, generating non-interest income and referring new loan opportunities to the business client advisor team & SBA team while meeting planned financial objectives. Assumes responsibility and is accountable for adherence to Bank policies and procedures, as well as all applicable state and federal laws and regulations pertaining to banking. Is responsible for execution of the Bank's business development plan for the greater Portland/SW Washington region to ensure meeting strategic plan objectives are met.**

### ESSENTIAL DUTIES

- 1. Develops and refers new account relationships utilizing cold calls, direct mailings, social media, attendance at business events, prospecting tools such as SNL, telemarketing and general relationship cultivation in accordance with established sales plans.**
- 2. Identifies and develops relationships of a large nature with potential commercial and retail clients by effectively meeting sales objectives.**
- 3. Identifies and generates leads for new business opportunities; obtains and analyzes background information on potential clients. Calls prospects and sets appointments.**
- 4. Develops and effectively communicates sales proposals to target clients.**
- 5. Creates and manages greater Portland/SW Washington region prospect list by working with Business Client Advisors, Business Development and TM teams to ensure that prospects are identified, ranked and contacted.**
- 6. Provides referrals to and participates in joint calls with Treasury Management Team, Business Client Advisors and other bank colleagues to send referrals to all teams including deposit gathering, lending and SBA Teams. Is a top referral source for new deposit business for the Portland team.**
- 7. Creates strategies for S&P Global Market Intelligence. Manages execution of specific identified strategies.**
- 8. Prepares presentations and proposals that offer creative solutions to meet the financial needs of our clients. Works with the Marketing Team to refine and enhance business development templates and presentations.**
- 9. Supports Community Reinvestment Act (CRA) through business development efforts.**
- 10. Represents the Bank in community organizations and activities to enhance the Bank's image and to maintain and enhance a referral network for business development opportunities.**
- 11. Refers clients requiring specialized products and services to other areas of the Bank as appropriate.**
- 12. Is a champion of Merchant eSolutions – coordinates merchant proposals and works with vendor on pricing strategy for prospects.**

- 13. Completes all sales activity documentation in Prophet (our CRM system) to provide a record for performance tracking and assist in targeting future sales efforts.**
- 14. Provides guidance and assistance to less experienced sales personnel.**

**SECONDARY DUTIES**

- 1. Works with the SVP Commercial Banking Team Leader to ensure Portland bank deposit goals are being met.**
- 2. Responds to inquiries or refers inquiries to the appropriate department or person, exhibiting the necessary follow through with clients and/or staff involved.**
- 3. Ensures all related paper and electronic file systems are maintained so that necessary documents can be found easily, and documentation is consistent and complete.**
- 4. Assumes responsibility for various department functions in the absence of staff members or in overload situations.**
- 5. Participates in internal committees assigned by senior management.**
- 6. Completes assigned Compliance Training. Maintains compliance with Bank's BSA/AML policies and procedures.**

**GENERAL**

- 1. Provides excellent personal customer service to all internal and external clients by treating people with respect; keeping commitments; inspiring the trust of others; working ethically and with integrity; upholding organizational values; and, accepting responsibility for own actions.**
- 2. Follows policies and procedures; completes administrative tasks correctly and on time; contributes to the overall profitability of the Bank through cost controls and expense monitoring.**
- 3. Applies good judgment in decision-making and sees beyond immediate assignments and acts on opportunities and problem areas.**
- 4. Performs position safely and reports potentially unsafe conditions.**
- 5. Excellent interpersonal skills.**
- 6. Works according to established schedules, arriving on time and with a positive attitude.**
- 7. Any other duties as defined by management.**

**QUALIFICATIONS AND DEMONSTRATED ABILITIES**

**These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge, skill and/or ability required to perform the position in a satisfactory manner. Individual abilities may result in some deviation from these guidelines.**

- 1. Bachelor degree in business administration or related field; or equivalent combination of education and experience. Work related experience should consist of five (5) to seven (7) years experience in banking and/or relationship management. Educational experience, through in-house training sessions, formal school or related curriculum, should be applicable to finance, accounting, or business.**
- 2. Strong sales, financial, leadership and analytical skills.**
- 3. Exceptional verbal, written and interpersonal communication skills with the ability to apply common sense to carry out instructions, write reports, correspondence and procedures, speak clearly to clients, employees, directors, and shareholders.**
- 4. Working knowledge of business and banking industry.**

- 5. Intermediate computer operation and keyboarding skills (e.g., email, word processing, spreadsheet, and specialty software program) to meet the production needs of the position.**
- 6. Excellent organizational and time management skills.**
- 7. Ability to read, analyze and interpret business periodicals, professional journals and technical procedures.**
- 8. Ability to deal with complex problems involving multiple facets and variables in non-standardized situations.**
- 9. Ability to work with no supervision while performing duties and to handle confidential information with discretion.**
- 10. Ability to work independently and as a part of a team.**

**PHYSICAL REQUIREMENTS**

- 1. Repetitive use of hands such as grasping, twisting/turning of wrists, and finger dexterity necessary to perform various clerical duties such as typing, writing, and maintaining files.**
- 2. Occasional use of arms such as pushing/pulling to open and close drawers and cabinets.**
- 3. Frequent walking to assist customers and staff members at various locations within the Bank.**
- 4. Ability to sit and/or stand for extended periods of time at assigned station.**
- 5. Ability to bend and/or reach, and to lift and carry up to 30 pounds.**
- 6. Continuous clarity of vision at 20 inches or less for normal processing of work.**