



Everyday Banking Advisor 1

Our bottom line is different.

There's something special about working at ATB, and it's been recognized on every [top employer list](#) that matters. Maybe it's our exceptional culture where your [total wellness](#) is supported through market-leading benefits and you're free to bring your whole self to work. Maybe it's our commitment to a growth mindset and our unrelenting thirst for [making it possible](#) for fellow Albertans—even the ones who aren't our clients.

Whatever it is, you won't find a more genuine, driven and knowledgeable group of humans anywhere. We foster a culture of purpose, performance and possibilities. We engage with intense curiosity, and bring our whole selves to work, every day. We know it starts with people like you, so take a chance and start with us.

Department: Everyday Financial Services (EFS)

Paygrade: F-PFS

System Job Title: Retail Banker 1

Leader: Branch Manager

As ATB's next Everyday Banking Advisor 1, you are dedicated to creating a remarkable ATB customer experience by acquiring, deepening and retaining everyday and business relationships. An Everyday Banking Advisor has a defined understanding of what a seamless and high level consistent client experience looks and feels like. They advocate for the client throughout their interactions with ATB experience from beginning to end by courageously advancing the future of ATB.

The Everyday Banking Advisor delivers on ATB's purpose to make it possible and to turn what into what if, the Everyday Banking Advisor is responsible to actively engage clients via leads or proactively to improve their financial picture leveraging financial wellness



conversations in their pursuit of deepening relationships and completing revenue generating activities. Acting as a connector within EFS, the Everyday Banking Advisor is responsible for creating leads to experts across ATB, inclusive of sales team members who can complete more complex sales needs in EFS, Business banking, and Wealth.

We exist to make it possible...

To turn what-if into when.

- Actively engage clients in saving time and money, improving their financial picture, and financial wellness conversations while increasing revenue generating activities.
- Provide advice and fulfill advisory and sales solutions to ATB360 clients to enhance the overall entrepreneurial experience.
- Consistently source leads to Retail, Business or Wealth colleagues to complete more in depth or time consuming requests for the best client experience.

To find a better way... in more than just banking.

- Generate revenue and achieve individual, team, organizational goals, while contributing to sales strategy
- Educate customers and fulfill self-serve banking options and assist clients with external applications.
- Peer mentor for the branch team to level up skill sets and proficiency within the client experience.
- Liaise with internal partners (Client Care, Business and Wealth) and other branch team members to ensure optimal customer service is maintained.
- Strategically utilized across any number of branches or markets.

To wrap our talent, tech and wisdom around the obsessive belief that anything is possible.

- Digital advocate within all our tools and technologies as part of the 2031 Strategy
- Effectively handle any overflow from Client Care inbound calls using the Genesys system.
- Proactively and consistently execute on inbound and outbound customer connections, with a focus on our priority connections, renewals and deepening relationships.
- Adapt to changing client preferences, including self-service options, to remain relevant while profitably serving our everyday, business, and wealth clients.



Requirements/Specifics/Execution of Role:

- Weeks 1 - 5 of 360 Degreeed Learning Path completed prior to commencement of EBA role
- Complete minimum 4 week Genesys and Customer Interaction Flow training program
- Understand and utilize Customer Interaction Flow (CIF) with every customer
- Successful completion of PB1 Milestone training to support advice based conversations, supporting and maintaining customer experience/relationships that are also revenue generating
- Expert knowledge of current operating systems and customer sales tools (i.e. CSA, CRM, Onboarding Express, Customer Story etc)
- Using data to create revenue generating opportunities and leads
- Building strong partner relationships to create a remarkable and seamless client experience.
- Willingness and ability to support multiple areas of the business, which could include multiple branches, Client Care and other customer channels of choice.

At ATB, we know that as you develop in your career, you gain many transferable skills. If you believe your experience and qualities are what we are looking for, please consider applying!

Interested? If you know one of our team members, BEFORE applying, reach out to them and ask them for a referral link to help your application stand out.

Online applications are preferred. Please let us know if you require any accommodations.

Benefits

Be great. Be you. Believe.

We are dedicated to building a workforce reflective of the diversity within our communities and creating an environment where every team member has what they need to reach their potential. We encourage candidates from all equity-seeking groups to apply.

What happens [next](#)?

Thank you for applying online. If you are shortlisted for this opportunity, you will hear from us after the posting close date regarding next steps. We might ask you to participate in a [digital interview](#) or phone interview. If you require any accommodations, please let us know.



Stay in touch!

ATB is excited to know you're interested in a career with us! Follow us on [LinkedIn](#), [Facebook](#) and [Instagram](#) to get the inside scoop on what our team is up to.