

BUSINESS DEVELOPMENT CONSULTANT MAR

Summary

I am a highly motivated individual with seven years of financial industry experience, specifically in the areas of risk management and compliance. My skills and strengths include, but are not limited to, excellent organizational, project management, and communication abilities, and expertise in compliance and risk management in both retail and commercial banking.

Highlights

Microsoft Office Applications *WORD, EXCEL, POWERPOINT, OUTLOOK *Ability to create reports and interpret data using Oracle Discover

Experience

01/2010 to Current

BUSINESS DEVELOPMENT CONSULTANT MAR Company Name i¼ City , State

- Develop commercial account procedures and guidelines.
- Create business member informational brochures, disclosures, applications, and marketing materials.
- Develop action plans to accomplish assigned goals for business accounts; manage activity within assigned budget.
- Track and report business account activity.
- Accumulate and report business account statistics; identify trends; recommend solutions/corrective actions/ process improvements.
- Regularly meet with current and prospective business members, as well as, support vendors (i.e. printing vendors, merchant processing vendors, etc.) to develop and enhance relationships.
- Provide monthly training to PCSU staff regarding all aspects of business member services.

10/2007 to 10/2009

BUSINESS SALES MANAGER Company Name i¼ City , State

- Directed the Branch Business Banker program for 133 branches in the Michigan Market, including the training and development of Assistant Branch Managers and the communication of progress and necessary action steps to senior management.
- Partnered with Retail Regional Managers & Branch Managers to identify performance gaps and develop strategies in order to close these gaps (telemarketing events, workshops, group training, one-on-one mentoring, etc.).
- Executed on all Business Sales Campaigns by coordinating Market wide "kick-off" calls, crafting call scripts, and ensuring proper tracking and reporting.
- Managed all aspects of off-site Business Banking Events which includes; the event organization, event agenda, workshop development, facilitation, and event host-person Facilitated communication of business products, offers, and processes.

06/2004 to 10/2007

OPERATIONS MANAGER Company Name i¼ City , State

- Prepared a region of 16 branches for audit by performing a Quarterly Risk Assessment to ensure all internal controls were adequate.
- Analyzed several reports daily such as Branch Cash Limits, ATM Balancing, and Regulation DD & Z (policy followed) to make recommendations for improvement and/or disciplinary action.
- Facilitated monthly Regional Manager's meetings to train Branch Managers on various operational topics, help write audit responses, and act as an operational expert.
- Developed branch operational policies and exceptions under the supervision of the State Retail Operations Director.
- Executed monthly Teller Manager conference calls and in person Operational Integrity training for Teller Managers and Branch Managers in Southeast Michigan and Toledo to train on new and existing operational developments.

Education

August 2000

Bachelor of Arts : Organizational Studies University of Michigan i¼ City , State Organizational Studies

Spring 2012

MBA : Finance Wayne State University i¼ City , State Finance

Certifications

Certified Credit Union Financial Counselor

Interests

My community involvement varies from planning, volunteering, and directly working with numerous outreach programs and events. The list includes, but is not limited to: Middle and High School Career Day participant Charter One's and Public Service Credit Union community service projects Detroit Public School/Eastern Michigan University project 'Gear Up' Service projects which include supporting various soup kitchens, homeless shelters and seasonal events which basically are 'people helping people' oriented. (Thanksgiving Dinners, food bank and clothing drives, etc...).

Skills

ATM, Banking, brochures, budget, Counselor, Credit, senior management, Financial, Director, Market, marketing materials, meetings, mentoring, EXCEL, Microsoft Office Applications, OUTLOOK, POWERPOINT, WORD, Oracle, policies, processes, progress, reporting, Retail, Risk Assessment, Sales, scripts, statistics, supervision, telemarketing, workshops

Additional Information

- COMMUNITY AND EXTRA CURRICULAR ACTIVITIES My community involvement varies from planning, volunteering, and directly working with numerous outreach programs and events. The list includes, but is not limited to: Middle and High School Career Day

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