

BUSINESS DEVELOPMENT SPECIALIST/BRANCH MANAGER

Summary

Well-qualified and results-oriented manager with 10 years of experience in positions of increasing responsibility and duties. Top-performer with a track record of consistently meeting or exceeding organizational and customer expectations. Skilled at inspiring and motivating staff to better themselves and others around them. Proven team leader with experience in performance management, HRIS, training and development, and candidate recruitment.

Highlights

- Team leadership
- Employee engagement
- Work force management
- Procedure development
- Operations management
- Training and development

Experience

Business Development Specialist/Branch Manager Apr 2015 to Dec 2015

Company Name 1/4 City , State

- Ensured the branches located in the assigned market area were properly staffed to meet the needs of the customers.
- Developed necessary procedures and processes to ensure staff operations were efficient and compliant with regulations and internal policies.
- Trained staff regarding new and updated policies, procedures and systems.
- Served as a Mortgagebot administrator and trainer for loan staff.
- Submitted loan and mortgage applications, reviewed credit and income to determine recommendation to assigned underwriter.
- Reviewed submitted loan and mortgage applications, income documentation, and creditworthiness in order to underwrite applications as appropriate.
- Cross sold products and services to customers as appropriate.
- Ensured all staff members were adequately trained both with respect to product knowledge, operational procedures, and selling techniques.
- Conducted sales training and staff development.
- Ensured that all reports and necessary information were completed in a timely manner.
- Conducted regularly scheduled sales, product, and customer service meetings.
- Maintained branch staff compliance with federal regulations including, but not limited to, Bank Secrecy Act, Anti-Money Laundering, USA Patriot Act, Regulation CC, Regulation D, Regulation E, and the credit union's information security program.
- Called on present and prospective customers and businesses within the office's market area.
- Actively participated in the community in a manner that reflected favorably on Members Choice Financial Credit Union.
- Directly supervised assigned personnel as follows: Reviewed candidate applications and resumes.
- Interviewed candidates for open positions.
- Selected new personnel as appropriate.
- Made provisions for the proper orientation and training of new personnel.
- Reviewed employee performance throughout the probationary period and on a regularly scheduled basis thereafter.
- Submitted employee discipline levels and/or discharge.
- Reviewed/Approved employee submitted time.

Branch Manager II Apr 2013 to Jan 2015

Company Name 1/4 City , State

- Communicated with the District Manager, other Branch Managers, and appropriate staff personnel in order to integrate goals and activities.
- Managed the Branch in a manner that meets the financial service needs of customers in and around the community.
- Worked with the District Manager in establishing branch growth, sales, and profit objectives.
- Provided input and established branch objectives as well as outlined strategic plans to meet branch objectives.
- Submitted loan applications, reviewed credit and income to determine recommendation to underwriter.
- Met with customers regarding loan applications; followed-up with necessary documentation for determining the potential acceptance of the application.
- Ensured the branch was being properly staffed and that the staff was trained to meet customer service needs as well as sales objectives.
- Made certain that all office operations were performed in accordance with established bank policies and procedures, either directly or through appropriate supervisor, e.g., branch balancing, control of vault cash, etc.
- Ensured the proper security, maintenance, and cleanliness of the branch; supervised the opening and closing of the building and vault.
- Took necessary measures for the securing and accounting of negotiable papers.
- Coordinated with the sales staff to establish specific sales and customer service goals for each sales representative.
- Ensured all staff members were adequately trained both with respect to product knowledge, operational procedures, and selling techniques.
- Conducted sales training and staff development.
- Ensured that all reports and necessary information are completed in a timely manner.
- Conducted regularly scheduled sales, product, and customer service meetings.
- Served as an active member of the branch's customer service team.
- Conducted teller drawer audits, ATM audits, and vault audits, ensured branch cash was kept within recommended levels.
- Maintained branch staff compliance with federal regulations including, but not limited to, Bank Secrecy Act, Anti-Money Laundering, USA Patriot Act, Regulation CC, Regulation D, Regulation E, and the bank's information security program.
- Called on present and prospective customers and businesses within the office's market area.

- Processed teller transactions as needed.
- Actively participated in the community in a manner that reflected favorably on U.S. Bank.
- Directly supervised assigned personnel as follows: Submitted position requisitions into Taleo, reviewed candidate applications and resumes.
- Interviewed candidates for open positions.
- Selected new personnel as appropriate.
- Made provisions for the proper orientation and training of new personnel.
- Reviewed employee performance throughout the probationary period and on a regularly scheduled basis thereafter.
- Recommended salary increases; submitted employee discipline levels and/or discharge.
- Reviewed and approved employee timecards.

Relationship Manager II Mar 2007 to Aug 2012

Company Name i¼ City , State

- Communicated with the District Manager, other Branch Managers, and appropriate staff personnel in order to integrate goals and activities.
- Managed the Branch in a manner that met the financial service needs of customers in and around the community/region.
- Worked with the District Manager in establishing branch growth, sales, and profit objectives.
- Provided input and established branch objectives as well as outlined strategic plans to meet branch objectives.
- Met with customers regarding loan applications; followed-up with necessary documentation for determining the potential acceptance of the application.
- Ensured the branch was properly staffed and that the staff was trained to meet customer service needs as well as sales objectives.
- Made certain that all office operations were performed in accordance with established bank policies and procedures, either directly or through appropriate supervisor, e.g., branch balancing, control of vault cash, etc.
- Ensured the proper security, maintenance, and cleanliness of the branch; supervised the opening and closing of the building and vault.
- Took necessary measures for the securing and accounting of negotiable papers.
- Coordinated with the sales staff to establish specific sales and customer service goals for each sales representative.
- Ensured all staff members were adequately trained both with respect to product knowledge and selling techniques.
- Conducted sales training and staff development.
- Ensured that all reports and necessary information were completed in a timely manner.
- Conducted regularly scheduled sales, product, and customer service meetings.
- Served as an active member of the branch's customer service team, coached staff to display outstanding services to internal and external customers.
- Called on present and prospective customers within the office's market area.
- Processed teller transactions as needed.
- Actively participated in the community in a manner that reflected favorably on the credit union.
- Maintained branch staff compliance with federal regulations including, but not limited to, Bank Secrecy Act, Anti-Money Laundering, USA Patriot Act, Regulation CC, Regulation D, Regulation E, and the credit union's information security program.
- Conducted teller drawer audits, ATM audits, and vault audits, ensured branch cash was kept within recommended levels.
- Directly supervised assigned personnel as follows: Selected new personnel as appropriate, reviewed candidate resumes, interviewed qualified candidates.
- Made provisions for the proper orientation and training of new personnel.
- Reviewed employee performance throughout the probationary period and on a regularly scheduled basis thereafter utilizing IPerfomease.
- Recommended salary increases; submitted employee verbal, written, final warnings, and/or discharge.
- Reviewed and approved employee time and attendance utilizing ADP.

Relationship Banker Jun 2005 to Feb 2007

Company Name i¼ City , State

- Served as an active member of the customer service team.
- Assisted new and existing clients with accounts.
- Recommended bank services and products as appropriate.
- Referred clients to internal partners as appropriate.
- Opened and assisted other Relationship Bankers in opening complex accounts.
- Obtained a working knowledge of banking regulations to include Regulation D, Bank Secrecy Act, USA Patriot Act, Regulation CC, Regulation E, and Anti-Money Laundering.

Education

Bachelors of Science , Psychology 2005 Radford University i¼ City , State Psychology

Software Proficiency

- Lotus Notes
- Microsoft Office
- Taleo
- IPerfomease
- ADP
- Etime Online Employer

- Fusion/Wizard
- Teller Navigator
- BankPro
- SharePoint
- Mortgagebot
- Symitar

Additional Information

- 2014 Quarter Three - U.S. Bank Pinnacle Award
- Top Investment Referrer for three years (2009, 2010, & 2012)
- NMLS Registration 2008-2015