

BUSINESS BANKING SPECIALIST

Summary

Top-performing professional with over 6 years experience in banking and finance. Seeking to take the next step in my career as a Regional Banking Branch Manager 2. Prior experience in a role as a business advocate Basic knowledge and understanding of retail and/or small business products and strategies Knowledge and understanding of mortgage industry and retail banking operations Experience sourcing small business clientele Ability to provide exceptional customer satisfaction to retain and grow customer banking relationships

Skills

Microsoft Excel, Microsoft Word, and Microsoft Outlook

Languages

Fluent in English and Spanish- Reading and Writing

Experience

01/2016 to Current

Business Banking Specialist Company Name i¼ City

- Effective organizational, multi tasking, and prioritizing skills Excellent verbal, written, and interpersonal communication skills Proficient with proactively sourcing, acquiring, building, and maintaining relationships with customers and colleagues High motivation with ability to successfully meet individual and team goals Ability to work independently without supervision Basic Microsoft Office (Word, Excel, and Outlook) skills.

01/2014 to 01/2016

Personal Banker Company Name i¼ City

- Experience leading or participating in events and activities for local networks or professional organizations, such as the chamber of commerce and professional business groups.
- Overseen the branch platform and teller side when management are off by making sure Customer Experience is top of mind at all times.
- Mitigating losses and Risks for the branch.
- Coaching in the moment by conducting bankers and tellers DBE's, and providing constructive feedback to my peers.
- Partner with branch manager and service manager to coach and mentor team members.
- Conducting morning huddles and meeting to go over any updates and options on how to improve our customer experience and present the conversation button to customers.
- Covering other branches while management is out of the branch.
- Attending the Business Hubs every Thursdays.
- Responsible for satisfying all customer service needs and to assist them with succeeding financially through quality retail product sales and referrals.
- Performs a wide range of services including exercising excellent customer service in all customer interactions and following up on Teller referrals.
- Primary functions surround proactively servicing mass-market customers, and referring customers to other areas of the bank for more complex products and services.
- Ability to speak clearly, succinctly, and accurately using a pleasant tone while using common conversational courtesies Attending the Business hubs every other Thursday with my business partners and fellow team members as part of my Business Advocate role.
- Call my assigned business leads and attend feet on the street every other Thursday to introduce myself to our local businesses.
- Experience interacting positively with difficult or hostile customers.
- Providing Notary Service for our customers and non customers.
- Building long term relationships with our customers and deepens the understanding of our customers' financial needs and provides professional suggestions.
- Stay within all store policy and procedure, mitigating losses.
- Provide personal financial counseling, assist with lending services, and build relationships with existing customers to sustain high satisfaction ratings and retention.
- Review and approve checks for cashing, and answer questions on accounts, loans, and statements.
- Assist customers during loan and account application process.

01/2013 to 01/2014

Lead Teller Company Name i¼ City

- Manage the Teller's work flow to ensure success with daily cash balancing, building great rapport with customers, and meeting their referral and sales goals- all while maintaining an ethical and positive work environment for all.
- Requires little supervision and juggle a variety of tasks including exercising excellent customer service in all customer interactions and managing and resolving customer conflicts.
- Follow procedures to minimize errors and reduce fraud.
- Provide customers with new products and services to help them succeed financially.
- Create, train, and coach a successful service and sales team.
- Ensure compliance with audit and operational regulations and guidelines with the bank.
- Support the Service Manager with daily operational tasks Assisting in resolving difficult customer service issues with quick and professional results.

Education and Training

High School Diploma : Math University of California, Riverside 1/4 City , State , United States

Skills

- Customer engagement, clerical support and the ability to interact effectively with a diverse group of individuals at various ages.
- Excel at interfacing with others at all levels to ensure organizational goals are attained.
- Proactive approach to build long lasting customer relationships and expanding my client portfolios.
- Possess excellent interpersonal, analytical, and organizational skills. Excel within a highly competitive environment through effectively managing, training and motivating a diverse team.
- Excellent working knowledge using both IBM and MAC systems; Microsoft Excel, Microsoft Word, and Microsoft Outlook.
- Fluent in English and Spanish- Reading and Writing Being recognize from Merchant manager, Retail Small Business Credit Consultant, and Payroll Partner numerous times.
- Being nominated for Searching for Stars and attending the dinner ceremony.
- Notary Public

Activities and Honors

Honor Society