

VP, CLIENT MANAGEMENT

01/2018 - PRESENT

- Phoenix, AZ
- Provide guidance in all phases of client service, client relationship building, and account maintenance to assist the business activities of HSBC's investment management capabilities
 - Understand the client needs in order to identify opportunities to expand and grow existing client relationships
 - Act as a liaison between Product and Investment teams, and back and middle office functions in order to satisfy client needs while operating within internal parameters and according to global standards policies
 - Manage the comprehensive period-end client reporting for designated product groups
 - Manage the end-to-end client management process
 - Enable a bottom line impact by excellence in the client management process
 - Ensure a direct impact to customer perception of HSBC by providing a high quality on-boarding/client experience

CLIENT MANAGEMENT

10/2010 - 08/2017

- Phoenix, AZ
- Cross selling PCM products appropriate to customer needs and providing superior service support for all PCM solutions
 - By analysing clients activities and providing advice and suggestions to clients to improve
 - Generate referrals for other Global Businesses, e.g. Private Banking (PB), Global Banking and Markets (GBM), Retail Banking and Wealth Management (RBWM), as appropriate
 - NAM infrastructure Managers
 - Global IT Client and MDM teams
 - Understanding and appreciation of the operation and culture of Chinese Banks, ideally with experience gained working within such an organization
 - Sound Credit or Risk knowledge
 - Navigate and liaise within a software development organization
 - Strong knowledge of the capital and credit markets and financial products

ASSISTANT, CLIENT MANAGEMENT

07/2003 - 04/2010

- Boston, MA
- Provide a positive and professional onboarding/client experience for all (new) customers
 - Help to understand clients' needs in order to improve our offering to existing customers
 - Generate cross country referrals facilitated via Global Links
 - Generate referrals for other Global Businesses, e.g. Private Banking (PB), GBM, Retail Banking and Wealth Management (RBWM), as appropriate
 - Accountable for delivering Client Service excellence globally effectively managing any risks and issues
 - Identification of opportunities globally and effectively managing the regional CSM's to deliver against client promises
 - Identify and introduce service improvements to improve the overall client experience
 - Resolves global client service issues and challenges as the final escalation point
 - Identify opportunities to streamline processes, eliminate redundancy, increase revenue and strengthen relationships

EDUCATION

OKLAHOMA STATE UNIVERSITY - TULSA

1998 - 2003

Bachelor's Degree in Finance

PROFESSIONAL SKILLS

- Clear communication skills with high influencing skills through concise, clear reasoning and confidence with senior audience
- Strong communication and presentation skills in both English and Chinese with proven ability to understand, develop and present at senior levels
- Proven problem solving/decision making skills
- Demonstrated team leadership and interpersonal skills
- Strong analytical skills, financial and business acumen
- Strong people leadership skills which create engagement and commitment to drive superior results achievements
- Strong analytical, problem-solving, technical Experience in driving team and individual performance to achieve customer and financial targets