

# Jessica Claire

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## Professional Summary

Team Manager/Operations Leader  
Enterprise Customer Care Specialist

Offering an award-winning track record of customer care excellence within high-volume environments that include...  
Collections \*Call Center \* Sales \*Loan Servicing

14 Yrs of commended performance in key Collections, Customer Service, Sales Management & Leadership roles.  
Expert in customer care/communications, problem solving, relationship building and Team building.

## Operational Skills

Call Center Operations	Contract Negotiation
Management & Team Building	Cross-Selling/Sales Support
Mortgage Services	Customer Order Fulfillment
Reports & Documentation	Retail Banking
Collections/Litigation	Risk Management
Loan Management and Origination	Financial Management & Forecasting
Project Management	Change Management

## Professional History

**KYC Team Manager - Consumer Banking**, 08/2014 to Current

**JP Morgan Chase**

Core responsibilities, creating an effective and efficient team through continuous communication, timely feedback, and appropriate leadership practices, Partner with AML Compliance/AML Analytics & Design teams to continuously develop and improve processes, Partner with Business Process Manager regarding required updates to Policies & Procedures to improve efficiencies, track and report daily productivity and quality metrics, Manage personnel issues, operational matters, and coordinate problem resolution as needed. Monitor employee performance to ensure adherence to productivity levels and quality of service within set time frames and guidelines, Define and communicate performance expectations, establish goals and core standards, write performance evaluations, conduct performance evaluation feedback sessions, and initiates progressive discipline as needed. Responsible for executing policies and procedures; ensuring audit compliance to minimize loss. Responsible for participating in regular RCSAs (Risk and Control Self Assessments) ensure appropriate controls are in place to mitigate risk and pass audits. domestic travel - approximately 10% - 15%. Act as escalation point for staff with customer issues to ensure service quality resolution & root cause. Provide leadership with suggestions and statistics to support process improvements that will generate additional revenue, lower servicing costs, and improve overall customer service and compliance standards. Support leadership in monitoring the business plans relative to service goals and manage the overall financial impacts. Support all functions within operations and the customer service environment, partner in the field of Compliance/Anti-Money Laundering/Know Your Customer preferred, Consumer Banking Risk/Fraud experience. Lead all efforts of personal development and coach staff on customer service processes building comprehensive knowledge of all aspects of the line of business processes and procedures, provide detailed knowledge of services and operation systems to ensure staff is proficient in all aspects of business software. Lead staff to be well versed in dealing with customers under difficult circumstances to ensure the ability to identify, analyze, plan, prioritize, and solve problems, by providing viable solutions and executing efficiently. Manage expenses/volumes and impacts to unit cost, strong focus on metrics to achieve performance goals.

**Team Leader - Electronic Financial Svcs. Treasury Svcs. and Securities**, 04/2013 to 08/2014

**JP MORGAN CHASE** – City, STATE

Managed teams of typically 10-20 employees and provided day-to-day coordination of a medium segment of the bank's internal operations activities for EBT Benefit accounts for State and Federal benefits to clients. Responsibilities varied within the following coordinating and directing the daily operations of aligned teams and front line supervisors. Provided daily coaching and feedback, recognizes and rewarded accomplishments and contributions, introduced new processes and procedures, and tracked performance to achieve outlined monthly business goals. Processed exception items, resolved complex issues, reviewed and recommended system modifications, conducted quality reviews, and monitored daily business. Directly partnered with all lines of business domestic and offshore to ensure accountability for deliverables were met on a daily/monthly basis. Tracked and developed talent within the line of business to prepare and produce future leaders. Recommend human resources' actions such as hiring, corrective action, terminations, salary actions, and promotions. Partnered closely with leadership on special projects within aligned function and the site. Lead successful start up and take down of the line of business ensuring employee new job placement, and decommission of appropriate business relationships with state and federal service agreements and contracts.

**CSD Team Leader- Collections Customer Assistance Team**, 03/2010 to 08/2013

**JP MORGAN CHASE** – City, STATE

Managed and Lead Collection, Litigation and Recovery efforts on all delinquent stages of client accounts. Managed a unit of approximately 18-20 collection agents in resolving customer debt situations and customer support program eligibility offers over the phone. Managed aligned collection unit to ensure their objectives and standards are met with the outlined compliance guidelines. Compiled and analyzed statistical data relative to aligned unit productivity, monitored live and recorded calls and provided on-going coaching advice and answers to questions concerning collections activities, reviewed the statuses of delinquent accounts and handled the appropriate volume and service levels for collection efforts. Proactively advised all staff of any current changes in policy or procedures, allocated resources, planned work schedules, and assigned work based on business needs. Consistently coached, developed and mentored staff, trained new staff members, conducted performance reviews and made recommendations regarding corrective actions and or dismissals as needed.

- Increased monthly staff retention rate by 40% after implementing new training programs.
- Increased overall collection revenue 65% by incorporating several quality process improvements within the unit.
- Received world class customer service satisfaction scores of 95% or greater for 8 consecutive quarters.
- Developed and maintained relationships with local Vendor liaisons to support third party collection efforts effectively.

**STS Team Manager- Sales Performance Manager**, 03/2008 to 03/2010

**JP Morgan Chase** – City, STATE

Supported the Enhanced Services Team, with strong partnerships within the Marketing and Legal Compliance teams, worked together to ensure each customer interaction was targeted with Ease, Expertise and Experience. Ensured strategic thinking, creativity, and delivery/execution was utilized within the units production teams to ensure we built world class customer loyalty. Ensured deliverables were outlined to achieve goals including customizing product/ services tailored to channel or customer, training support for targeted service options, utilization and knowledge of innovative tools and various resources within customer service. Managed the core responsibilities of identifying, creating and supporting service readiness, tracking performance trends, identifying strengths and opportunities, coaching, development, motivating and problem-solving across multiple lines of business some of which included service and retention departments. Key focus on consulting within the environment to identify opportunities, gather feedback, and communicate to stakeholders with the vision of improving the customer experience. Partnered effectively with call center site management to offer continuous support in many Enterprise initiatives, site preparedness activities, and reciprocal feedback to the business. Reviewed and recommended new methods and procedures that acted as a catalyst to improve operation efficiency and resolution in various strategies. Championed a robust rewards & recognition program that included semi-annual awards events. Additional responsibilities included the ability to identify, create and support site/service delivery, track performance trends, identify potential gaps, coach, develop, motivate and problem-solve across multiple functions (Phones/Non-phones). In addition, provided: Chase Brand/Partner, Engagement, and ALT Offer awareness & education · Trending/analysis for improved experience · Call Center Site support and consultation · Feedback loop for business stakeholders Support with implementation of change initiatives.

**Team Manager/Operations Sales Leader**, 04/2006 to 03/2008

**WAMU/JP Morgan Chase (Bank Merger)** – City, STATE

Fostered a robust, sustainable sales Teams leveraging strong listening, presentation and closing skills to optimize sales results. Demonstrated an unwavering commitment to customer service, adding new customers while maintaining premium service levels with existing accounts. Managed enterprise sales staff, hiring and recruiting efforts of department staffing needs, ensuring sales goals/objectives are set and monitored progress of up to 50-100 non-exempt employees. Provided coaching, encouragement and team building to support the sales culture and goals set to encourage success. Coordinated lending activities to provide products/services to customers. Facilitated and Directed Sales Meetings, Huddles, Calibrations and Conferences. Monitored workflow processes, schedules and operating efficiencies. Analyzed workflows and organized work routines for a more efficient daily operation, and improved scheduling to contribute to the achievement of production goals and to drive operations. In addition to responsibilities above, led start ups domestic and off-shore, lead the management and takedown of queues servicing high net worth (major Co-brand and Private Label) partners. Supported in hiring, improving development performance standards, developing and implementing quality monitoring processes for improved risk controls for San Antonio and partnering sites across enterprise. Consistently delivered high level sales revenue equaling \$750,000 semi-annually which was a 2% increase of previous averages. Highly proficient with call routing, resource staffing, service level management and volume forecasting. Achieved customer satisfaction and employee satisfaction results at the enterprise level (top 5%). Consistently maintained top employee retention results on all teams. Handled and resolved highly elevated issues for clients; improved customer satisfaction rates 8 consecutive quarters. Continuously collaborated with marketing partners and client liaisons to improve customer experience through system and scripting enhancements and reward program improvements.

**Credit Card Customer Service Specialist -Sales Coach**, 11/2000 to 04/2006

**JP MORGAN CHASE** – City, STATE

Supported as front line customer support by putting the customer first and doing what's right and creating solutions that make their lives better. Began building my career on a strong foundation of business acumen and helped shape what's next for my career and the business. Supported a leading provider of diverse financial services worldwide, and actively sought support from team members to create lifelong engaged relationships with internal and external customers by delivering superior service and quality with every customer interaction. Successfully maintained a flexible and problem-solvers approach and enjoyed helping customers resolve their questions and concerns. Supported peer coaching and customer service efforts to our retail and credit card customers with a broad array of products and services. Supported Customer Service with knowledge of the following skills: Customer focus taking ownership of each customer while empathizing and prioritizing customer needs and resolving conflicts and managing customer expectations to determine customer needs and provide appropriate solutions through relationship building and effective communication skills and effective verbal and written communication with both external and internal customers. Documented customer account activities thoroughly and concisely, engaged in interactive dialogue with customers through active listening, problem solving skills and always approached problems logically and with good judgment to ensure the appropriate customer outcome, made appropriate decisions on behalf of the customer quickly and effectively, effectively prioritized work to ensure efficiencies were sustained, conducted research as needed utilized analytical skills and critical thinking to exercise independent judgment with accuracy and attention to detail to abide by all applicable regulatory and department practices and procedures. Utilized computer skill familiarity with multiple browsers, multiple tabs, window navigation and instant messenger tools with proficiency in Windows Operating Systems and Microsoft Office tools.

## Education

**High School Diploma**: 1996

**William Howard Taft High School** - San Antonio, TX.

**Associate of Arts**: Graphic Arts/Multi-Media Design/Business, 2000

**Palo Alto College at A&M** - San Antonio, TX

## Accomplishments

- August 2014 Leader of the Month Award
- June 2013 Leader of the Month Award
- August 2012 Leader of the Month Award
- March 2010 – Employee Experience Award
- 2009 –Team Manager Elite Coach Award – Site Impact Award – Quad Impact Award
- 2006 – Elite Coach Award (1st,2nd,3rd Quarter)
- 2006 – Customer Service Excellence Award, Top Sales
- Conversion Rate Award
- 2004 – Elite Coach Award 2nd & 3rd Quarter
- Repeatedly received recognition from superiors for excellence in service and leadership.

## Technology Skills

Microsoft Office (Word, Excel, Outlook, PowerPoint) and specific knowledge of systems and applications used to support a call center environment.