

Robert Smith

Small Business Specialist

CONTACT DETAILS

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PERSONAL STATEMENT

Detail-oriented, efficient and organized professional with extensive experience in accounting systems. Possess strong analytical and problem solving skills, with the ability to make well thought out decisions. Excellent written and verbal communication skills. Highly trustworthy, discreet and ethical. Resourceful in the completion of projects, effective at multi-tasking.

WORK EXPERIENCE

Small Business Specialist

Wells Fargo - 2012 - 2019

Responsibilities:

- Maintain and develop efficient relationship with business development team and promote banking business.
- Analyze customer portfolio for customers and maintain optimal customer relationships for new business acquisition.
- Establish customer requirements and recommend appropriate loan products and initiate approvals.
- Administer referrals and direct meetings and develop business opportunities.
- Ensure compliance to all standards and policies and ensure secure transaction for customers.
- Design product launches and marketing campaigns and provide optimal levels of customer service and ensure satisfaction.
- Meet company sales and customer service goals quarterly with selfcreated business planning Responsible for scheduling and organizing events in community Strong ability to work with Wells Fargo channels insurance (life, auto, renters), merchant services, commercial and residential property, and business loans.

Business Specialist

ABC Corporation - 2010 - 2012

Responsibilities:

- Peachmac was sold to Simply Mac Generated \$150k in sales on Apple products and third party accessories.
- Delivered Apple hardware to local businesses.
- Managed business-to-business customer relationships for my store.
- Utilized DayLite software and cold-called local businesses.
- Trained customers one-on-one after they purchased Apple products.
- Taught coworkers how to activate iPhones with AT&T NEXT.
- Coached sales team how to get business lead introductions..

Education

Bachelors of Arts in computer studies - (California State University of San Bernardino - San Bernardino, CA)

SKILLS

Sales, Customer Service, Money Handling, Loans, Management, Risk Management, Staff Management, Coaching, Microsoft office.

LANGUAGES

English (Native)
French (Professional)
Spanish (Professional)

INTERESTS

Climbing
Snowboarding
Cooking
Reading

REFERENCES

Reference - 1 (Company Name)
Reference - 2 (Company Name)