

ROBERT SMITH

Business Specialist

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SUMMARY

Provide highest level of customer service to both internal and external customers. Work well under pressure, while maintaining a professional and helpful attitude towards all customers. Demonstrate excellent analytical, decisive ability in making appropriate assessments quickly. Work independently in a fast-paced, changing environment Demonstrate excellent and positive interpersonal skills, in order to work effectively with all level of department heads, co-workers and customers.

CORE COMPETENCIES

Word processing, Spreadsheet, Strong verbal and written communication skills, organized, attention to detail, excellent researcher, phone system, filing, utilize and maintain office equipment, and computer operations.

PROFESSIONAL EXPERIENCE

Business Specialist

Presbyterian Homes - 2016 – 2019

Key Deliverables:

- Generate monthly statements and manage the timely collection of client receivables.
- Analyze, investigate and correct accounting entries as needed, while performing reconciliation of complex transactions.
- Verify the accuracy of monthly financial statements and revise potential errors.
- Check figures and documents for correct entry and mathematical accuracy.
- Review resident accounts and ensure accuracy of all requested resident refunds.
- Monitor and maintain aged trial balance for collection and past due purposes.
- Manage collection of accounts receivable process through effective and frequent communication including verbal, written and/ or legal process as needed, whilst promoting improvement of future payments.

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ABC Corporation - 2015 – 2016

Key Deliverables:

- Acted in a branch based position where my primary goal was to acquire, retain, deepen and manage relationships with business customers.
- In this role I was responsible for developing and cultivating my existing customer relationships and gaining new relationships through business to business sales.
- Partnered with specialists (such as Loan Officers, Business Bankers, and Financial Advisors), to ensure our customers got access to experts who can help them with specialized financial needs.

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- As a small business specialist I was responsible for Generating growth in balances through the sale, marketing, promotion and referral of products utilizing a proactive and disciplined approach.
- Took a lead role in creating an outstanding customer experience and built positive interpersonal relationships with business owners Helped the Branch meet sales objectives contributing to the success of the firm with my strong negotiation, selling, influencing and presentation skills Prospected for business opportunities in and outside the branch to retain and grow premier business customers.
- Answered questions and helped other Bankers with business questions and identified new business opportunities.
- Had an assigned portfolio of customers and proactively met with them - face to face and over the phone - to discover their financial needs and provide product and service recommendations..

EDUCATION

- BS in Business Administration - (Lincoln University - Jefferson City, MO)