

# ROBERT SMITH

## Business Specialist II

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### SUMMARY

Eight years of experience working in professional administrative roles, including 5 years at the U.S. Department of Energy's (DOE's) Waste Isolation Pilot Plant (WIPP).

### SKILLS

Silver Career Readiness.

### WORK EXPERIENCE

#### Business Specialist II

Wells Fargo Bank - November 2011 – 2019

- Responsible for generating and servicing SBA loans, Conventional Business Loans & Lines, Deposit Relationship, and Treasury Management Services.
- Effectively acquires, manages and grows profitable account relationships with an extensive percentage of moderately complex and Mid-Market business customers that have annual gross sales of generally more than \$2MM to \$20MM.
- Ensures the overall success & growth of an assigned portfolio by deepening relationships of existing customers and through the acquisition of new customers.
- Proactively partners with C-Level Executives in order to fully understand their businesses, goals, strategies and challenges.
- Accurately assesses their financial needs for the purpose of formulating a business plan and delivering an effective variety of financial products and services in order to help the customer succeed financially.
- Performs effective financial analysis and underwriting in the areas of credit, cash flow and collateral.
- Effectively partners with other Bankers and lines of business to deliver the full complement of Wells products and services.

#### Business Specialist

ABC Corporation - 2008 – 2011

- Manage existing accounts regarding office products - order & delivery.
- Identify customer needs in terms of office supplies and recommend solutions that best meet their business requirements.
- Preserve customer satisfaction by quality assurance visits with clients to maintain strong effective relationships with purchasing contacts.
- Call upon new businesses and promote cost effective office supplies.
- Present samples, fliers, or catalogs and highlight profitable features of products.
- Quote prices, convey credit terms, and prepare sales contracts.

- Coordinate with Customer Service to inspect and resolve customer issues; follow-up on deliveries and back-ordered items..

## SCHOLASTICS

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