JUSTIN MORROW

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PROFESSIONAL SUMMARY

Performance-driven **Account Executive** & **Program Manager** with 10+ years of full cycle business development experience in financial services and fintech. Strong leadership acumen with can-do attitude and excellent cross-functional collaboration to achieve sales objectives and influence outcomes with affluent, high net worth and business clients. Expertise in using digital tools to increase sales and continuously improve efficiency, which has contributed to the team's revenue growth of 100% in five years. Excited to bring a solid foundation in designing and delivering sales and service training to new hires and seasoned associates.

AREAS OF EXPERTISE

- **Business Development**
- **Program Management**
- **Enterprise Portfolio Management**
- **Change Management**
- **Customer Centricity / CRM**
- **Strategic Enterprise Transformation**
- **Project Management**
- **Communications**
- **Training / Leadership**

WORK EXPERIENCE

MERRILL LYNCH WEALTH MANAGEMENT – SEATTLE, WA

REGISTERED SENIOR CLIENT ASSOCIATE *August 2016 - Present*

- Conduct up to **26 client meetings per week** focusing on onboarding, implementing, and reviewing personalized investment portfolios and financial plans for c-suite business clients and individual clients.
- Spearhead program management of Client Experience, Financial Planning and Sales Operations.
- Perform monthly analysis of market segments and develop strategies to grow the business.
- Work cross-functionally to build and implement sales training programs for **6,000 Client Associates** to expand the adoption and usage of firm technology to enhance business growth.
- Won multiple Awards for cross-selling Merrill Lynch and Bank of America's products to enhance the client experience. *Highest ranking associate in the firm when sub-benchmarked for assets under management against **8,900 competitors**.*

CAPITAL ONE – SEATTLE, WA

SALES & SERVICE BUSINESS ANALYST *January 2016 – August 2016*

- Researched and identified training gaps in new hire onboarding, and built a case with senior management to extend training and mentoring with multiple KPI checkpoints before graduating.
- Tracked, analyzed, and reported on **60,000 contacts per month** of net promoter score data to senior management to identify client satisfaction with the company's products and sales associates' performance.
- Acted as project manager of the department's internal engagement surveys, including design, review, and presentation.

CAPITAL ONE – SEATTLE, WA

SALES & SERVICE PEOPLE MANAGER *July 2013 – January 2016*

- Co-led and developed **a team of 20 high-performing associates** to meet and exceed business goals.
- Provided onboarding sessions & training; offered feedback, driving continuous improvement in the quality and quantity of strategic sales focusing on reaching the team objectives.
- Delivered presentations at weekly team meetings to **increase sales payouts by 25%.**
- Graded ~**300 inbound/outbound calls, emails and chats per quarter** to provide performance improvement coaching to associates across the department.

- Created and led department wide junior associate training in a two-week Series 7 and 66 test preparation, **improving exam pass rate by 30%.**
- Led strategic change initiative program for department's people managers that focused on reorganizing leadership roles and responsibilities to align with Capital One's mission statement.

CAPITAL ONE – SEATTLE, WA

SALES & SERVICE SUPERVISOR *June 2011 – July 2013*

- Mentored **10-12 associates** on a weekly basis to improve call quality, focusing on escalations.
- Handled client complaints; Negotiated cash settlements with clients to avoid further ligation; Saved approximately **$1 million** for the company in 2012 by improving the high-dollar disbursement verification process.
- Completed outbound campaigns to high-value customers, **worth $250k to $25 million**, to gauge client satisfaction and sell special services to them.
- Worked closely with the marketing team on website design, content creation, and marketing promotions.
- Re-evaluated and modified deceased account procedures, having as the outcome noticeable client satisfaction given by the incremental efficiency of the process.

CAPITAL ONE – SEATTLE, WA

SALES & SERVICE ASSOCIATE *March 2010 – June 2011*

- Handled up to **50 inbound and outbound client contacts a day** regarding investment accounts and equity market questions.
- Revised website FAQs, company's terms & conditions, and email templates in line with company's brand messaging.
- Collaborated with media team to generate social marketing content, and provide exceptional customer experience.

EDUCATION

- **Masters in Sport Business Leadership,** Seattle University
- **B.A in Journalism,** Western Washington University

LICENSES & CERTIFICATIONS

- FINRA Series 4 License
- FINRA Series 7 License
- FINRA Series 24 License
- FINRA Series 66 License
- Certified Financial Planner designation
- Chartered Retirement Planning Counselor designation