Robert Wagner

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Professional Summary

About me: 20+ year dynamic background in Sales and Marketing, Customer Service, banking, education, and SaaS Support. I thrive on building relations with clients and my team, and am especially excited to provide training for new hires and professional development for existing team members!

Skills & Experience

- Professional Presentations Design and Delivery - 1,000+ delivered
- 20+ years of volunteer teaching, in addition to on-site one on one training for new staff
- Consultative B2B and B2C Sales and Customer Service - 15+ years
- IT Security Training - 10+ years
- Familiar with Prezi, PowerPoint, Teams, Adobe and Figma (Can help with or run design process)
- Microsoft Suite, including Word, Excel, Dynamics CRM, and Outlook
- Professional Written/Verbal Communication - Planning and collaborating at all business levels
- HTML, CSS, and Javascript

Employment

Applications Support Engineer II | MVi - Millennial Vision, Inc. & CDi   **2018 – Present**

MVi/CDi provides SaaS Solutions for Financial Institutions and Municipalities in Electronic Content Management systems, including hardware and software deployment, configuration, and support.

- **Train New Employees |** As a SaaS Software provider for Credit Unions, the support experience is unique, and I regularly undertake to train new employees, or those who need to acquire new skills on our team.
- **Team Collaboration |** The team needed an annual review form revamp, so I improved the PDF, converting it to a Web-based Form, easily accessible and seamlessly integrates with our record-keeping system to create goals and career paths within the company.
- **C-Suite Level Communications |** Providing world-class service, and driving loyalty - one customer even recommended me on LinkedIn after I engaged active listening, and resolved multiple issues he had had with previous versions of our software

Solutions Specialist | MVi - Millennial Vision, Inc.   2017 - 2018

- **Customer Service Efficiency |** Fast-paced, solutions-driven, objectives achieved. Sometimes solving 100+ tickets per month (average individual team volume: 40-60 tickets per month)

Recruiting Manager | Robert Half   2017

Robert Half provides talent sourcing services for Finance and Accounting roles, as well as Technical and other business process roles.

Assistant Branch Manager | Utah First Federal Credit Union   2016-2017

- **Team building / Training |** Reduced branch turnover from 75% to 25% by analyzing the team's motivations/interests, providing regular branch snacks (on my own dime, but worth it), as well as a positive, upbeat attitude to help keep the team happy and engaged
- **Initiative |** Designed a branch-specific marketing slick, and used it to prospect local dealerships
- **Sales |** Added 3 new dealer partners that same week and began taking new loan applications

Field Admissions Representative | Universal Technical Institute, Inc.   2012 – 2015

Universal Tech. provides technical career training for Automotive, Diesel, and motorsports industries.

- **Presentation and Public Speaking |** Delivered nearly 1,000 career planning presentations
- **Public Relations |** Conducted over 400 interviews with students and their families to discuss their education and career path, and plan a course to help them achieve it

Member Consultant | BECU   Jan 2006 - Feb 2012

Key Achievements

- **CU Experience |** 6+ years delivering world-class member service in full suite financial products.
- **Forecasting/Marketing |** Observing our aging membership, BECU needed to gain a strong base of younger members to secure better growth. I coordinated and visited local high schools to provide financial literacy training for students, which resulted in multiple new member applications from the younger generation.

Volunteer Work | Bennion Community   2024

Web Design and Development | Built from scratch a [Community Website](#) to serve as an information vehicle for the Bennion Community Emergency Preparedness Fair.

Education

BYU - Idaho | BS Web Design & Development