

Robert Wagner | TAM

Salt Lake City, UT

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Professional Summary

About me: 6+ years in SaaS Software/Technical Support, and 20+ years in Sales and Customer Service overall; including full cycle technical service from implementations, customer training, cross-sells, and software configurations, to server migrations, contract fulfillment and IT Project Management.

Why Technical Account Manager? I am ready to take my career to the next level, and this role aligns beautifully with my own personal career goals, values and vision. My primary passions are building relationships, and helping people succeed, I can do both long-term as a TAM.

Skills & Experience

- **Sales & Customer Service** | 20+ years in Tech, Banking, Advertising, Education, and TA
- **Communications** | Recognized by leadership as an expert communicator, especially written - where my case notes were regularly referenced to solve similar complex issues
- **Conflict Resolution** | Regularly convert negative exp. Into positive ones through active listening and collaborative customer service. One customer even gave me a positive LinkedIn review
- **Microsoft** | Microsoft Outlook, Word, Excel, Teams, CRM, SQL Server, and SSMS
- **Adobe** | Photoshop, Illustrator, InDesign, Premier, Express, and others

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.

- **Productivity** | Completed 30+ complex contracts in 2023 in addition to case escalation load
- **Case Management** | Taking on lengthy cases to reduce overall response time for frontline
- **IT Project Management** | Coordinate with internal/external teams on 10+ concurrent projects
- **Special Projects** | Upgraded our fillable PDF Annual Review Form to a dynamic, data-rich, Web-based Form that was then used by the entire company

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

- **Customer Service & Efficiency |** Fast-paced, solutions-driven, objectives achieved. Sometimes solving 100+ tickets per month (average Solutions Specialist' volume is 40-60 tickets/month)
- **Team Collaboration & Sales |** Regularly conducted business analysis when connecting with customers to discover/refer sales opportunities that resulted in additional revenue for our team

Recruiting Manager | Robert Half**2017***Robert Half provides Talent Acquisition Services for Technical and Financial roles*

- **Productivity |** Delivered nearly 50% of my annual compensation revenue in one transaction by investigative consultation, understanding the role well, and sourcing the right talent efficiently

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 Technical Institute provides technical training solutions in the Automotive, Diesel, Motorcycle, Water Sports, Welding, and Dental Assisting job markets*

- **Territory Development |** Went from 15 to 50+ active accounts through consistent follow up, professionalism, and multiple balanced forms of communications (email, in-person, and phone)
- **Public Speaking |** Customized and delivered 1,000+ career planning presentations
- **Public Communications |** 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 | Boeing Employees Credit Union (BECU)**2006 - 2012**

- **CU Experience |** 6+ years delivering world-class member service in full-suite financial products.
- **Forecasting/Marketing |** BECU needed a base of younger members for future growth. I brought in new membership by coordinating with high schools to train their students in financial literacy

Education

BS - Web Design & Development | BYU**Certificate - Web Media | BYU****AS - Business | Green River College**