

# JESSICA CLAIRE

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## Executive Summary

Seeking a position where my diverse background of experience in corporate training, employee development, project management, financial services, brokerage operations/training, customer service, HR, and operations management will be used to its fullest potential.

## Core Qualifications

- Staff development
- Policy/program development
- Cross-functional team management
- Project Management
- Supervision and training
- Service Quality Improvement

## Professional Experience

### Learning and Education Specialist, 2011 to Current

#### Svb Financial Group “ Seattle, WA,

- Deliver full range of learning programs including New Hire, soft skills and technical training programs to SDN Travel Consultants and Team Leaders
- Delivery virtual classroom facilitation and activity based learning either through virtual training over platforms like LiveMeeting and Adobe Connect - Support and consult on design of blended learning training
- Supervise trainees during the use of E-Learning courses, Virtual courses via iLinc platform or Instructor Lead courses. Assess students knowledge to close out classes using Levels 1, 2 or 3 evaluations in QuestionMark.
- Responsible for training and development of management, supervisory and non-management employees
- Organize and train New Hire employees classes for up to 20 students on company products, services and sales
- Incorporate Adult Learning concepts into all training courses for companies new systems, policy, procedures and effective tools, New Hire orientation and company benefits
- Accountability for managing performance for new hires in achieving pre-defined performance goals. Observe, evaluate and measure trainee performance and report data through to training delivery leader, dashboard/LMS and line management system.
- Design, develop training curriculum, technical procedural documentation and train domestic and international travel agents via instructor lead or Virtual training.
- Collaborate with Instructional Design Staff and the business on training modifications including new system rollout and standards.
- Stay connected with the business through QA Calibrations, Manager and Supervisor meetings along on the job side by sides with front line agents to coach on performance improvements and quality results using positive reinforcement
- Supervise direct reports from state of employment in regards to new hire paperwork, Employment documentation and report to Managers, Supervisors and HR.

### Learning and Education Specialist III, 01/2007 to 01/2011

#### AA University “ City, STATE,

- Launch training at AAA's Call Center in Glendale(500 reps) and Oklahoma City(600 reps)
- Rio Salado College Adjunct Professor training classes for College Restricted Credits for AA Degree
- Supervise trainees during the use of E-Learning courses, Virtual courses via iLinc platform or Instructor Lead courses. Assess students knowledge to close out classes using 1 and Level 2 evaluations in AAA University and Rio Salado College(approx 18 classes per year)
- Responsible for training and development of management, supervisory and non-management employees
- Organize and train New Hire employees classes for up to 40 students on company products, services and sales
- Incorporate Adult Learning concepts into all training courses for companies new systems, policy, procedures and effective tools, New Hire orientation and company benefits
- Design, develop training curriculum, technical procedural documentation and train domestic and international travel agents (150 reps) via instructor lead training
- Maintain a working knowledge of Companies business lines including AAA Membership, AAA New Hire Supervisor, AAA Domestic and International Travel, AAA Insurance Products including Auto and Homeowners
- Collaborate with Instructional Design Staff and the business on training modifications including new system rollout and standards for Virtual Facilitation Certification for AAA University facilitators 9059 West Bluefield Ave Peoria, Arizona 85382 cell resumesample@example.com

### Operations Specialist II, 01/1 to 01/1

**Charles Schwab & Company Inc** – City, STATE,

- Operations & Classroom Training for field representatives on procedures related to Managed Accounts products and completing the account application (100 reps)
- Accurately interprets regulations and communicate firm's policy with regard to regulatory requirements. Minimizes late payments and excessive regulatory extensions, enforces trading restrictions to accounts on trade settlement violations, and provides final review and approval on wire transfers and check disbursements.
- Assist Advised Investing representatives, Financial Consultants and other field partners in addressing client inquiries. Assist internal Schwab departments with navigating current Advised Investing clients to their appropriate teams. Answer questions regarding the Advisor Port platform and facilitate resolution in regards to operational issues
- Assist team employees with questions related to the system and on processing daily tasks by on the job training and process account applications and paperwork for the Schwab Private Client Program.
- Research potential (or actual) errors and losses to ensure prompt and accurate resolution. Regular contact with internal and external customers to solve problems and conduct research resolution for inbound call inquiries, supporting Branch Office Staff requests, and assisting other Schwab operations and service departments.
- Process all paperwork and research along with completing a cost basis to insure proper reporting for the Managed Account Select Program

**Billing Disputes Senior Customer Service Representative/Representment Agent**, 01/1 to 01/1

**Bank Of America Bankcard Services** – City, STATE,

- Provide system training to all team employees including side by side coaching, performance feedback, and floor supervision.
  - Assist Customer Service Professionals with problem resolution and provide classroom training coverage along with scheduling meetings with department administrators and managers to improve training requirements
  - Responsible for workflow development and process re-engineering geared at streamlining existing policies and procedures with technical procedural documentation and writing within the Service Delivery area. Also Created, revised and distributed internal procedures and curriculum program
  - Created training modules used to train new hire and internal employees. Performed new hire and internal training classes regarding functions related to the department or system updates
  - Supervise the Correspondence Specialist by processing queue approvals system reject corrections, MasterCom review, high dollar amount case review, review representative's stats and case quality control
  - Responsible for addressing written and phone inquiries from customers, researching, correcting billing disputes, and issuing credit/debit memos, ensuring compliance to corporate, federal, Visa, and Mastercard regulations. Review credits files and increase credit card limits. Provide support services during increased workloads to the departments of Collections, Fraud and Service Delivery. Process first time charge backs
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## Education

**Adult Basic Education and E:** Education and E,

**Maricopa Community Colleges, Rio Salado Community College** - Phoenix, Arizona

GPA:

Maricopa Community Colleges, Rio Salado Community College-Phoenix Arizona-Currently enrolled in Adult Basic Education and E-learning Design Degree

**Certificate:** MEMBERSHIP,

**Associated Travel School-North Miami Beach Florida-Travel** - North Miami Beach, Florida

GPA:

Associated Travel School-North Miami Beach Florida-Travel degree/Certificate MEMBERSHIP ASTD 10707688  
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## Accomplishments

- AAU Innovation Award 2008
- AAU Dedication Award 2010
- AAU Collage Collaboration Team Award 2009
- AAU Collage Development Team Award 2009
- AAU Collage Performance Improvement Team Award 2009
- AAU Collage Best Overall Team Award 2009
- Brandon Hall Group Excellence in Learning Awards 2014
- AAU Dynamic Instructor 2009
- AAU Collage

## Affiliations

Maintain a working knowledge of Companies business lines including AAA Membership, AAA New Hire

Supervisor, AAA Domestic and International Travel, AAA Insurance Products including Auto and Homeowners

### **Certifications**

Service to Sales Certification through Ridge Associates ASTD Synchronous Learning Certification Customer Service Certification through BPA International Domestic and International Vender Travel Certifications (34 Vender Certificates) 2007 -2010

### **Skills**

Training, Documentation, E-learning, Adult Learning, And Sales, Benefits, Instructional Design, Instructor, New Hire Orientation, Rollout, Sales, Customer Service, Receptionist, Retail Sales, Operations, Accountability For, Blended Learning, Calibrations, Hr, Learning Delivery, Learning Management System, Lms, New Hire Paperwork, New Hires, Qa, Sdn, Telnet, Training Delivery, Training Programs, Virtual Learning, Virtual Training, Billing, Coaching, Collections, Correspondence, Credit, Credit Card, Credit/debit, Customer Service Representative, Increase, Problem Resolution, Quality Control, Re-engineering, Scheduling, Workflow, Project Manager, Basis, Clients, Payments, Trading, To Sales, Award