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Profile Summary

- Experienced professional with thirteen years of leadership experience having a successful career in banking, business development, and administration.
- Excel at interfacing with others at all levels to ensure organizational goals are attained.
- Proactive approach in capturing new accounts and expanding client base.
- Excellent interpersonal, analytical, and organizational skills.
- Successful in highly competitive environments where service and leadership skills are the keys to success.
- Effective leader with the skills necessary to direct, train, and motivate staff to their fullest potential.
- Experience in Operations, Lending, Business Development, Compliance, Sales and Service.
- Converting banking centers from a model with teller and bankers to financial wellness consultants.
- Have led underperforming teams to success at multiple institutions and branches.

Experience

KeyBank, Seattle, WA

Jan'19 – Current

Branch Manager

Belltown & SoDo Branch, 4-5 direct reports

- Belltown achieved the “Red Key” award for the first time in 10 years under my leadership.
- Able to fully staff SoDo after the staff was on constant rotation for the last five years.
- Canvased local businesses and clientele to open new relationships with KeyBank around the Belltown and SoDo area.
- Meet with key players in the community in order to network and create a lasting relationship that will be mutually beneficial for the bank and the stakeholder.
- Coached employees to develop book of business and maintain relationships with clients.
- Focused on five major areas of production such as payments, lending, deposits, investments and small business.
- Small Business Leader for the area, hosting weekly meetings and strategy sessions to understand how we can expand our business.
- Worked with multiple managers to coordinate a strategy to promote KeyBank's products and services and ensure the entire area wins.
- Worked closely with line of business partners in order to create seamless solutions for KeyBank clients including retail and back office partners.
- Increase market share through expansion of book of business with development of new and existing relationships as required by region, and by closely monitoring and tracking KPI's.
- Payroll Protection Program lead for the Area.
- Leveraged the Payroll Protection Program to grow Key's business clientele through building a lasting relationship.
- MLO/NMLS certified for mortgage processing
- Signature Guarantee certified

San Diego County Credit Union, San Diego, CA

Dec '14 – Mar '18

Vice President, Branch Manager

Point Loma Branch, Mission Valley & San Diego Branches, 5,000-10,000 transactions per month, 8-10 direct reports

- Met checking, auto, investments, ratio, after-market products, teller sales and direct deposit goals by 115% or more for 2016, 2017 and 2018.
- Completed a branch budget for year 2017 and ensured branch stayed within allotted budget for 2016.
- Promoted two employees to a higher position within the credit union.
- Coached employees to develop book of business and maintain relationships with members.
- Engaged with the community and attended 30 events throughout the year.

- Became a part of the Peninsula Chamber to help network with key individuals within the community.
- Trained several new employees after branch exceeded expectations and outgrew current FTE allotment after five months of being opened.
- Experience processing Real Estate loans and NMLS certified.

Assistant Branch Manager

National City Branch, 9,000 transactions per month, 9 direct reports

- Opened the credit union's 38th branch that became #1 in checking, AMPs, Investment Referrals, MSR Sales and FSR encounters in 2015.
- Coached employees based on member encounters and provided them feedback to improve their sales and service.
- Attended multiple events and networked with key people in the National City community to increase community presence and awareness.
- Coached employees to develop book of business and maintain relationships with members.
- Exceeded goals consistently in 2015 and 2016.
- Trained several new employees after branch exceeded expectations and outgrew current FTE allotment after five months of being opened.
- Conduct daily, monthly and quarterly audits on all branch negotiable items and accounts.

KeyPoint Credit Union, Cupertino, CA

March '14 – Nov '14

Assistant Branch Manager

Cupertino Branch, 5,000 transactions per month, 5 direct reports

- Hired four new staff members once on boarded and helped to reorganize the branch after management change.
- Chosen as the training supervisor for new core system implementation.
- Provided several useful areas of opportunity for the credit union to streamline processes to make transactions more efficient for members.
- Coach employees to sales and audit practices
- Implemented new processes and policies in order to make the
- Initiated mortgage and equity loans for members.
- Attended community events to garner business and network such as Diwali, Santa Clara Chamber meetings, etc.

Washington State Employees Credit Union, Seattle, WA

March '07 – March '14

Assistant Branch Manager

University Branch, 14,275 transactions per month, 12,600 households, 12 direct reports

- Business Development – Orchestrated meetings with community leaders in order to spread the word about our credit union and solicit new membership.
- Exceeded service expectations earning a perfect 4.0 rating from our membership in 2012 and 2013.
- Helped redefine new employee lending training by coaching the existing trainers.
- Conduct loan audits and teller audits to ensure consistency.
- Implemented new “Universal Agent” position within branch network.
- Motivate staff based on observed interests; monetarily, public recognition, etc.
- Reduced branch employee count through attrition to reduce costs and still keep same standard of efficiency.
- Maintained branch budget within credit union guidelines.
- Conduct all employee evaluations and reviews every six months.
- Built long-term member relationships by providing consistent communication with employees including monthly dialogues and monthly coaching/observations.
- Hired and trained six new employees and molded them into star performers.
- Implemented a peer coaching system in order to facilitate personal growth in sales and leadership.
- Implemented a series of checks and balances in the branch in order to minimize credit union losses.
- Selected as the contact point for employees to discuss the upcoming changes to WSECU's field of membership.

Computer Skills

Microsoft: Word, Excel, PowerPoint, Publisher, Access, FrontPage, Outlook, SilverCloud Knowledge Management, Teams, Sharepoint.

Operating Systems: Q-Cash System, Teller 21, HOGAN, VISA DPS, Application Extender Imaging System, Lobby Tracking, WorkForce, Raddon, Symitar, OSI, MeridianLink, WITS, ADP, Harland, Card Wiz and Metavante.

Education

Bachelor of Business Administration - 2008

University of Washington, Seattle, Washington

Masters of Business Administration - 2017

Washington Governors University, Salt Lake City, Utah