**LISA VAN HUIJKELOM**

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**SUMMARY OF QUALIFICATIONS**

 Proven ability to work independently and apply a fast learning initiative.

 Capable of multitasking while being proficient with each task.

* Known for providing high-quality customer service in a variety of settings.
* Team player with strong interpersonal and communication skills and excellent problem solving and troubleshooting abilities. Highly motivated and dedicated with a high degree of self initiative.

 Bilingual: English and German.

**EDUCATION**

**The Pennsylvania State University***,* Abington, PA May 2014

**Major:** Corporate Communication GPA: 3.0

**Minor:** Business

**Relevant Coursework:** Advanced Business Writing, Speech Communications, Corporate Communications

Information Science Technology, Marketing, Management.

**CERTIFICATIONS**

Series 6 License – Obtained August 2016

Series 63 License – Obtained September 2016

**EXPERIENCE**

**Infinicept, Denver CO**  November 2019 – Present

*Tier II Customer Care Analyst*

Adding boarding services to new accounts and customizing their custom fields to what they need for success.

 Supporting the Account management team and their customers.

 Working through incoming ticket requests and emails.

 Problem solving, researching new requests, and implementing updates requested from clients.

**CardConnect, Denver CO**  February 2019 – October 2019

*Account Manager*

Point of contact to partners during the project lifecycle, ensuring business requirements are being met.

 Plan, manage, and control project schedules while overseeing the completion of deliverables and logging them in Salesforce.

 Support the ISV team and partners throughout the life of the relationship.

 Monitor and report progress to ensure projects are delivering key milestones to target timescales.

**CardConnect, King of Prussia PA**  April 2018 – February 2019

*Boarding and Implementation Specialist*

Boarding accounts onto the North, Omaha, and TSYS platforms.

 Creating file builds/VAR sheets for terminals and software requests.

 Ordering devices and providing tracking numbers as soon as they are available.

 Solving problems, fixing files, working research tickets, and solving issues for sales reps and merchants.

**CardConnect, King of Prussia PA**  September 2017 – April 2018

*Partner Solutions Specialist*

Responding to phone calls, emails, and tickets from Sales Representatives.

 Researching residual questions, sales code changes, funding issues, and clover re-provisions.

 Advising sales representatives on which devices are able to be utilized on specific platforms.

 Solving issues and answering questions on the phone or helping sales representatives create research tickets.

**Vanguard, Malvern PA**  December 2016 – September 2017

*Retail Client Account Services Specialist*

Processing client requests in four different systems. (AWD, WAVE, BETA, and VAST)

 Using the systems to change client’s addresses, phone numbers, names, and email addresses.

 Cashing and depositing checks based on the clients requests and handling transfers to and from contra firms.

 Calling contra firms and clients when additional information is needed to process a request.

**Prudential, Dresher PA** August 2016 – December 2016

*Annuities Customer Service Associate*

Helping clients understand their annuity and living or death benefits associated with their contract.

 Speaking with a client’s financial professional or their assistants to go over contract specific information.

 Walking authenticated callers through specific forms based on individual contracts and requests.

 Reviewing forms and requests to determine if they are in good order and to see if any additional information is needed.

**MRO Corp, Norristown PA** March 2016 – July 2016

*Requester Services Specialist*

Guiding patients through forms to request their medical records.

 Reviewing forms and requests for medical records and determining if they are in good order.

 Sending notifications to clients advising them of further actions needed to have their requests in good order.

 Taking at least 140 calls a day from clients and lawyers requesting patient records.

**Vanguard, Charlotte NC** October 2015 – January 2016

*Client Relationship Specialist*

Assisting many different types of investors with meeting their financial goals.

 Using virtual technology to connect with clients and helping to manage their assets.

 Developing personal relationships with clients to understand their individual investment wants and needs.

 Helping clients understand and navigate their online accounts and transactions.

**Corporate Brokers (Prudential), Dresher** PA April 2015 – July 2015

*Associate Process Analyst*

Review and process long-term care applications to update and verify client contact information.

 Identify and correct errors in letters that were sent out apology letters.

 Cross-reference current contract information and correct previous data-entry errors.

 Maintain database through specific queries and excel spreadsheets.

 Work within the extensive database system and test regions to research, analyze and review claims.

**Randstad (Vanguard), Malvern** PA November 2014 – March 2015

*Retail Services*

Answer questions and concerns from clients regarding their accounts and complete transactions.

 Create the perfect customer service system with short handle times but also answering the clients questions or concerns thoroughly.

 Chosen for the ESI (Efficiency Solutions Initiative) project to reduce call times and create great customer service experiences.

**Applebee’s,** Lansdale PA June 2011 – September 2014

*Waitress*

 Taking care of guests needs as well as creating the “See You Tomorrow!” atmosphere.

 Opened and closed the restaurant while ensuring other staff members adhered to proper procedures.

 Raised funds for *Alex’s Lemonade Stand* byrequesting donations, and represented the restaurant at events.

**TECHNICAL SKILLS**

**Computer Capable:** Word, Excel, PowerPoint, Outlook, Photoshop, Publisher, BETA, VAST, Merchant Manager, CoPilot, FDPOS, MAMA, AccessOne, EMV, Clientline, SalesForce, and TSYS.