

Client Name

123 Anywhere, Any Town, USA

Home: 123-456-9999 • Client-name@yahoo.com

Financial Services Representative

Well-rounded, experienced Customer Service and Financial Services Professional with over 15 years providing outstanding top-notch leadership; and a personal human touch within residential and commercial reconciliations areas. Possess solid customer service background with knowledge of risk management, financial reporting, automated accounting systems, and Federal Trade Commission regulations. Increased assets and operating efficiency of company by exceeding objectives. Committed to the assistance and support of others while maintaining a cheerful and helpful attitude. Ability to build rapport with customers, clients and colleagues through effective and precise communication. A dedicated and loyal client and customer service professional that possesses keen attention to detail and a heightened sense of both personal and professional initiative.

Core Strengths

- ♦ Need Assessment
- ♦ Effective Business Etiquette
- ♦ Project Management
- ♦ Customer Relations
- ♦ Workflow Management
- ♦ Public Speaking
- ♦ Problem Solving
- ♦ Process Improvement
- ♦ Cost Reduction
- ♦ Revenue Projecting & Forecasting
- ♦ Supervision & Training
- ♦ Team Building & Management

Technical Expertise

Microsoft Office (Word, Excel, PowerPoint)

Professional Experience

Sprint, Elmsford, NY

2008-2009

Retention Representative

Assisted members with questions regarding their membership and committed to maintaining a cheerful and helpful attitude. Built rapport with customers through effective and precise communication.

Key Accomplishments

- Answered dealer inquiries concerning Sprint policies and products
- Built a rapport with customers and proposed different products and services based on their account history to help minimize their monthly bill
- Researched accounts, answered questions, and worked with new customers
- Assessed client needs and recommended appropriate products or modifications
- Advised customers and sales people concerning the best hardware and software solutions for their requirements
- Worked closely with the sales, service, engineering, and shipping departments to meet the needs of the customers
- Collaborated with customers, management, and other bank departments to resolve problems and answer questions

Verizon Communications, New York, NY

1999-2007

Financial Services representative

Researched accounts, answered questions, and worked with new customers. Assessed client needs and recommended appropriate products or modifications.

Key Accomplishments

- Awarded Customer Service Associate of the Month 7 times
- Developed credibility and confidence with customers
- Trained in and maintained excellent interpersonal and communication skills that complement proven creative problem solving capabilities
- Responded to inbound customer inquiries regarding claim procedures
- Recognized for outstanding and timely follow-up on data input

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- Successfully pacified hostile or antagonistic callers and negotiated a mutually agreeable solution by patiently providing alternatives to reconcile the customer's needs with the company's objectives
- Committed to the assistance and support of others while maintaining a cheerful and helpful attitude
- Reduced inbound drop call percentage to 3%
- Researched requests, checked availability, and, if necessary, recommended alternative products
- Contacted concerned customers to obtain feedback in an effort to better serve them

Crown Heights Senior Services, Brooklyn, NY

1994-1999

Case Aide

Analyzed problems and anticipated customers' needs. Responded to inbound customer inquiries regarding claim procedures. Recognized for outstanding and timely follow-up on data input. Researched requests, checked availability, and, if necessary, recommended alternative products. Handled customer inquiries and complaints. Directed inbound and outbound call activities. Responded to inbound service calls in a fast-paced, high volume call center. Dealt tactfully and effectively with difficult customers. Demonstrated skill in providing excellent customer service. Experienced in both customer service and supervisory positions.

Key Accomplishments

- Visited and set up new accounts for clients and quoted prices
- Maintained positive company image during difficult situations
- Involved with all aspects of customer service and order entry including solving problems, answering questions, and working with customers to ensure fantastic service
- Involved in all aspects of customer service including solving problems, establishing and accessing customer accounts, and performing credit evaluations
- Solved customer problems and assured satisfaction
- Identified problems and directed clients to proper advisors
- Processed new applications, performed credit and criminal background checks, showed apartments, and compiled weekly traffic and activity reports
- Proven ability to handle large volume calls in a professional and courteous manner
- Interacted effectively with clients and staff at all levels
- Conveyed payment information, cycle dates, and interest rates with each contact
- Presented a cheerful and helpful manner with customers and colleagues
- Performed weekly billing and generated billing reports on a weekly, monthly, and yearly basis
- Accepted new customer applications by phone and assisted in general customer service duties

Education & Training

Bachelor of Arts, Sociology, Brooklyn College, Brooklyn, NY, GPA: 3.5, Major GPA: 3.5.; 1995