

# CLIENT NAME

Address ♦ City, State

PHONE ♦ EMAIL

## FINANCIAL SERVICES PROFESSIONAL

Seasoned Financial Services Specialist with more than 20 years' experience in Payroll Administration, Project Management and Financial Consulting. A presentation expert, with the skills to do thorough presentations in home, at seminars and in a call center environment to meet the customer's financial needs. Utilization of marketing expertise to increase client retention. Effective leveraging of key vendor relationships to facilitate the delivery of the various products that precisely meet client needs. Outstanding interpersonal communication and negotiation skills.

### AREAS OF EXPERTISE

- ♦ Customer Service
- ♦ Client Relationships
- ♦ Benefits Administration
- ♦ Skilled Underwriter
- ♦ Project Management
- ♦ Strategic Planning
- ♦ Office Management
- ♦ Account Management
- ♦ Payroll Administrator
- ♦ Implementation Specialist
- ♦ Marketing Expert
- ♦ Team Leadership
- ♦ Document Management
- ♦ Presentations & Reports
- ♦ Insurance Consultant

### PROFESSIONAL EXPERIENCE

**APAC/NCO CUSTOMER SERVICES GROUP, Charlotte, NC**

2013-Present

**Licensed Insurance Agent/Medical Benefits**

- ♦ Answer benefits/enrollment phone calls and provide web assistance for Anthem Blue Cross Blue Shield.
- ♦ Educate consumers on the Affordable Care Act and the essential health benefits that were mandated by January 2014.
- ♦ Communicate the value of the different medical benefit plans that include dental, vision and the prescription drug process.
- ♦ Maintain record of benefit choices for the calendar year.
- ♦ Provide the customer with basic benefits information.
- ♦ Determine customer's eligibility for subsidies that will assist them with the cost of their monthly premiums and the deductible cost share.

**WORLD FINANCIAL GROUP, Atlanta, GA**

2010-2013

**Marketing Director/Financial Services**

- ♦ Cultivated a large client base that resulted in \$1 million dollars of transactions in 12 months.
- ♦ Oversaw and provided directives and training for 69 team members.

**Other duties Included:**

- ♦ Responsible for business development, lead generation, referrals and employee recruitment.
- ♦ Coordinated and performed weekly training sessions for associates.
- ♦ Managed client presentation in the office and in the field.
- ♦ Utilized internal system to convert prospects to clients.
- ♦ Used a thorough underwriting process to track and maintain client paperwork.
- ♦ Used creative marketing strategies such as networking, mailing flyers, hosting events/seminars, and making phone calls to meet the company's goals.

**PAYTECH INC., Greenwood Village, CO**

2011-2012

**HRMS/Payroll Implementation-Consultant/Project Manager**

- ♦ Transitioned 11 locations to a new HRMS and Payroll System in only 1 year.
- ♦ Supervised and provided directives to over 26 internal team members.
- ♦ Efficient use of ADP and Ulti-Pro solution to ensure success project objectives were met in accordance with the project goals.
- ♦ Provided ADP HRIS/Payroll consulting.

**Other duties Included:**

- ♦ Coordinated and performed lifecycle of assigned implementation projects in compliance with implementation methodology (Business Analysis, Summary of Business Rule Requirements, System Configuration, Data Mapping, Parallel Testing, Live Processing and Support Transition).
- ♦ Provided analytical and design expertise, system configuration, data mapping, testing and client support of live payroll processing.

ADP Inc., Alpharetta, GA

2003-2011

Project Manager (2006-2011)

Client Technical Support II (2005-2006)

Payroll Operations Consultant II (2003-2005)

- ◆ Developed SOW documents, projects, and test plans.
- ◆ Consulted with users to define project objectives and business/system requirements.
- ◆ Planned and coordinated quality assurance and testing of projects within ADP/COS environments.
- ◆ Created and maintained client version/product list to ensure information availability for product release impacts.
- ◆ Provided technical support to Client Service Solution Center regarding the resolution of product and client issues.
- ◆ Assisted in new product rollouts/patches.

**Other duties Included:**

- ◆ Provided mentoring and oversight for Project Service Associates.
- ◆ Developed and managed the project methodology, in conjunction with existing Implementation and NAS project methodology.
- ◆ Coordinated the assignment of projects.
- ◆ Management of individual workloads and associate utilization.
- ◆ Oversaw the billing process to ensure accuracy and timeliness.
- ◆ Met regularly with team to review office and project issues.
- ◆ Monitored client deliverable schedules to ensure that target dates are met.
- ◆ Developed and assisted in implementation of strategy to meet or revise deliverables to client's satisfaction.
- ◆ Collaborated with internal partners to formalize project upgrades critical to achieving all project milestones and completion dates with minimal additional costs.
- ◆ Generated significant cost savings by implementing key initiatives to streamline upgrade operations for providing technical information and best practices across the business via network shared services (HRMS Tier II Share Drive.
- ◆ Managed key escalations, supervised scheduling, and overall issue resolution for COS upgrade clients and assigned Solution Center Region Teams.
- ◆ Planned and coordinated training programs to educate client service teams in product features and enhancements as well troubleshooting within Enterprise/Pay Force processes.
- ◆ Implemented processes to track and manage issues regarding desktop, connectivity, workspace, logins and client accessibility for new associates as part of standardizing technical service operations.
- ◆ Monitored and processed back-end/post payroll/HR operations, and interfaces for large multi-platform clients hosted using an enterprise application.
- ◆ Successfully identified and resolved payroll system issues per client requirements via SQL Plus and UNIX.
- ◆ Scheduled client processes using Tivoli by creating job streams/instances to support the appropriate batches and SQR's crucial to completing each cycle.
- ◆ Led a conversion project to support the transition of a client's database to Ann Arbor Hosting Center.
- ◆ Minimized operational risks by 75% by creating a comprehensive emergency response to enhance processes and procedures for all direct deposit clients.

**PREVIOUS WORK HISTORY**

From 1991-2003, worked in various roles within the Financial Industry. Those roles included such titles as: Account Manager, Technical Support Analyst, Client Account Manager, Pricing Specialist/Training Coordinator, Payroll Specialist and Senior Tax Analyst.

**EDUCATION**

- Information Systems Management, Colorado Christian University, Denver, CO
- Bachelors of Science in Project Management, Richmonds University, London UK
- PMI - Intro. Project Management

**LICENSE/CERTIFICATION**

- Certified Life, Accident & Health License