

Client Name

Account Executive

Seasoned and detail-oriented professional with proven track record in account and sales management, specializing in building robust client relationships and driving strategic sales growth. Expert in navigating the complexities of financial products and services, leveraging cross-functional collaborations to enhance customer portfolio management and compliance. Renowned for deploying effective relationship-building strategies to expand a diverse client base and foster community engagement. Recognized for leading B2B relationship growth and implementing targeted strategies to increase revenue and business expansion. Technically proficient in Adobe Creative Suite (Photoshop, Illustrator, InDesign), Sketch, and Microsoft Office Suite.

Areas of Expertise

- Account Management
- Regulatory Compliance
- Sales/Financial Management
- Contractual Negotiations
- Research & Analysis
- New Account Development
- Relationship Building
- Risk Management
- Team Leadership/Building

Professional Experience

Bank of America, Rochester, New York

Relationship Manager

2018 – Present

Orchestrate cross-functional collaboration with internal banking partners to optimize cross-selling opportunities and enhance customer portfolio management. Conduct thorough assessments of loan compliance with regulatory standards and drive business growth through strategic sales of financial products, including deposit accounts and loan services. Implement robust treasury management and fraud protection strategies to safeguard client assets. Offer expert guidance on online and mobile banking platforms, deposit services, and investment products, such as CDs and IRAs. Employ relationship-building techniques to expand and nurture a diverse client base, leveraging targeted outreach and community engagement to foster referrals and visibility.

- Achieved top 3% sales performance in the company through effective client portfolio growth and retention strategies.
- Enhanced loan portfolio quality by ensuring adherence to credit policies and conducting regular reviews.
- Successfully managed and grew B2B relationships, contributing to sustained revenue increases.
- Streamlined SBA loan processing with meticulous cash flow analysis and credit approval documentation.

Sutherland Global Services, Rochester, New York

AT&T Business Sales Team Manager

2012 – 2018

2015 – 2018

Directed sales initiatives and client relations for a high-performing B2B tele-sales team, focusing on large-scale account management and consultative selling. Formulated and executed annual sales quotas, driving profitability through strategic forecasting for both existing and new product lines. Orchestrated team efforts, scheduling and delegating tasks to ensure operational excellence and adherence to sales targets. Instituted robust training programs for a 30-member tele-sales team and support staff, emphasizing customer service and sales techniques. Fostered lasting client relationships by maintaining a comprehensive database and initiating outreach programs. Partnered with internal Fraud Prevention to streamline order processing and safeguard transaction integrity.

- Enhanced program's annual attainment by 5%, demonstrating a keen ability to exceed sales objectives.
- Onboarded key accounts, including Warner Bros and Delta Private Jets by liaising with field agents and procurement teams.
- Developed and disseminated official AT&T quotes to manage orders, ranging from 1 to 450 service lines.
- Cultivated a skilled salesforce to achieve notable improvements in work results through mentoring and performance appraisals.
- Executed customer service strategies that contributed to formulation of company-wide strategic plans and operational reviews.

AT&T Business Sales Representative

2012 – 2015

Enhanced client retention and expanded market footprint by strategically scheduling daily outreach to service existing accounts, secure orders, and establish new accounts, leading to a measurable increase in sales revenue and client base. Bolstered management's strategic decision-making by delivering comprehensive activity and results reports, including daily call insights, weekly plans, and detailed monthly and annual territory analyses, facilitating data-driven adjustments in sales strategies.

- Drove product and service improvements by analyzing performance outcomes and competitive trends, recommending strategic adjustments that resulted in improved market positioning and customer satisfaction.
- Elevated customer satisfaction and loyalty by addressing and resolving complaints, devising effective solutions, and advocating for customer-centric policy adjustments to achieve significant reduction in client grievances and an increase in repeat business.

Education & Certifications

LEAD Graduate – Management Development Program | LEAP Certified