

# Client Name

## Chief Operating Officer Profile

Accomplished and results-driven professional with extensive experience in driving operational excellence and transformational change across financial institutions. Proven track record in leading substantial growth initiatives, enhancing customer experience, and developing robust human resource frameworks. Known for pioneering innovative operational strategies, fostering employee development, and executing strategic mergers/integrations to enhance overall corporate efficacy and stakeholder engagement. Skilled in integrating core processing software across banking systems to enhance operational support and customer service capabilities. Proven ability to lead complex projects and initiatives to prepare organizations for scalable growth.

## Areas of Expertise

Problem Resolution  
Team Leadership/Building  
Change Management

Business Management  
Employee Engagement  
Contractual Negotiations

Leadership Development  
Customer Service  
Operational Management

## Professional Experience

**Blue Ridge Bank, Luray, Virginia**  
Chief Experience Officer

2021 – Present

Direct operations teams across lending, deposit, and servicing divisions, optimizing workflow and enhancing service delivery effectiveness. Forge strategic alliances with cross-functional executive teams to initiate comprehensive operational, customer service, and employee engagement strategies, boosting overall organizational efficiency. Streamline company-wide policies and procedures, ensuring robust governance and enhanced operational efficiency across all business lines. Devise innovative recruitment and retention strategies to stabilize the workforce and reduce turnover rates, securing critical talent in a competitive market.

- Launched an enterprise Call Center, scaling to six representatives that managed over 10,000 monthly calls, significantly improving resolution rates and customer satisfaction levels.
- Spearheaded the planning and design of a new corporate Operations Center, effectively managing a \$2.2M budget, which enhanced organizational capacity and operational agility.
- Enhanced stakeholder engagement by developing targeted strategies that increased satisfaction and loyalty among employees, customers, and shareholders.
- Managed an Indirect Auto program valued at \$33M to achieve substantial growth and profitability targets.
- Led customer experience team to optimize the Bank's core processing software provided by Jack Henry and Associates ("JHA") to enhance system functionality and user satisfaction through strategic administration initiatives.

Chief Talent Officer

2021

Crafted and administered executive employment contracts and equity award programs, while ensuring compliance and alignment with corporate objectives. Coordinated and conducted monthly town hall meetings and various employee events, fostering corporate culture and enhancing internal communication. Directed seamless integration of benefits and employee relations for three major mergers and acquisitions to ensure continuity and employee satisfaction during critical transitions.

- Orchestrated successful rollout of Paylocity Employee Information System to streamline data management and improve operational efficiency.
- Negotiated employee litigation cases to achieve favorable outcomes that minimized risk and safeguarded company interests.
- Spearheaded HR infrastructure development for a \$3B financial institution, optimizing HR services for over 550 employees across diverse business lines to enhance organizational efficiency and compliance.

Chaired the Executive Management Committee, steering strategic decision-making processes that significantly influenced corporate policies and operational strategies.

- Served as primary executive leader for expansion and modernization of operational, retail, marketing, and HR infrastructure, scaling the bank's assets from \$250M to over \$3B, a tenfold increase to enhance service delivery and market presence
- Negotiated and managed Core Data Processor conversions for two major financial institution acquisitions, securing over \$100,000 in savings on conversion fees to optimize financial resources and integration efficiency.

## Additional Experience

Loan Administration/Special Assets Officer, Pioneer Bank - Stanley, Virginia

Human Resources Administration Adjunct Instructor, Eastern Mennonite University, Harrisonburg, Virginia

## Education

### Master of Business Management

Eastern Mennonite University, Harrisonburg, VA

### Bachelor of Science (Major: Psychology | Minor: Human Resource Development)

James Madison University, Harrisonburg, VA

## PROFESSIONAL TRAINING & COURSES

The Executive Program (TEP) | University of Virginia-Darden Exec Ed, Charlottesville, VA

Customer Experience Program | University of Richmond-Exec Ed, Richmond, VA

Women in Leadership | University of Virginia-Darden Exec Ed, Charlottesville, VA

Virginia Bankers Association Executive Leadership Institute

Virginia Bankers Association School of Bank Management

## Committee Involvement/Volunteerism

VBA EBL Steering Committee

Training and Leadership Development Chair | ABA Emerging Leaders Council