

Branch Financial Sales Consultant

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Objective

Responsible for explaining the characteristics and eligibility requirements of various loan programs and government guidelines in order to determine the appropriate loan programs that meet the customers financial needs.

Skills

Call Center, Customer Relations.

Work Experience

Branch Financial Sales Consultant

ABC Corporation - October 2014 - February 2016

- Acquired and deepened the branch customer base through a variety of proactive sales and service activities.
- Managed the customer experience by identifying opportunities to improve the customers financial well being.
- Collaborated with ecosystem partners to grow customers share of wallet.
- Positioned PNC solutions to drive new revenue and customer loyalty.
- Drove proactive sales conversations through internal and outbound interactions with a defined sales process including outbound calling, service to sales, teller interactions, appointment setting and effective lobby engagement, ultimately elevating client loyalty.
- Delivered a full PNC conversation with every client interaction to identify appropriate PNC solutions.
- Leveraged ecosystem partnerships as well as community Centers of Influence to acquire, expand and retain relationships.

Branch Financial Sales Consultant

Delta Corporation - 2012 - 2014

- As a Branch Financial Sales Consultant, I assisted the branch in obtaining multiple goals.
- This included goals specific to credit cards, equity and non- equity loans, investment, and mortgage and wealth referrals.
- Profiling personal and business customers for cross-sell and household growth opportunities.
- Developing new personal and business relationships to help grow bank portfolio.
- Provided customer service, new account sales, originating loans, working with partners to develop relationships and make referrals.
- Processing and originating commercial and consumer loans.
- Maintain a cash drawer, while providing quick and accurate transactions and excellent customer service.

Education

BS In Criminal Justice