

Naomi Wheeler

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Successful leader and supervisor with a proven track record for effecting positive change and motivating staff in new directions. Consistently recognized for leadership skills and office management initiatives. Strong project management skills. Skilled in managing various offices. Instrumental in the training, organizing, and development of new branch openings. Excellent interpersonal skills. Active listener with ability to effectively communicate with colleagues, clients, subordinates, and others within my market and surrounding communities.

Expertise

BMO HARRIS BANK (M&I Bank)

July 2008 - Current

Service Manager, April 2015-Current

- Provide professional and courteous service in processing a wide variety of day-to-day and special service customer transactions.
- Resolve customer related issues promptly using knowledge of bank services, products and processes.
- Oversees daily staffing (including breaks and lunches) to minimize customer wait times and enhance service levels, leveraging the branch scheduler tool.
- Identify referral opportunities by uncovering customer needs and recommending an appropriate product or service.

Product Knowledge and Referral Development

- Utilize opportunities to suggest or cross-sell bank products and services.
- Make qualified referrals to other team members.
- Meet and exceed all referral goals.
- Participate in additional training to enhance skills.
- Support the bank's community involvement by participating in community activities.

Risk Management

- Identify risks associated with regulatory compliance, overdraft authority and bank secrecy act.
- Adhere to all bank policies, directives and procedures.
- Complete all branch audits.
- Understand and enforces dual control procedure at all times.
- Conduct ongoing robbery training with staff and ensure security measures are followed.
- Ensure all necessary documentation is completed for all transactions.

BMO HARRIS BANK (Continued)

Leadership for Staff Performance

- Manage, coach and develop staff by assigning work, training, answering questions, solving problems, helping with complex transactions, and sensitive customer relations problems/complaints.
- Train staff to have the skills to understand and execute customer banking transaction and how to be proactive in offering suggestions and options on the different products to refer to team members.

- Develop PPA's, developmental plans, training, goal settings and corrective actions.
- Coordinates daily work routines and assigning duties for staff.
- Lead the hiring process for service representatives.
- Lead team in meetings, including daily huddles.

Senior Personal Banker, July 2008-April 2015

- Assure customer receive superior customer service.
- Contact customers on a daily basis to follow up on service and uncover additional needs.
- Coach and develop staff on referrals, products, and services.
- Generate and review daily reports.
- Originate and close consumer loans.
- Identify new customer opportunities in my market.
- Develop relationships with business partners to create financial solutions for customer's needs.

Bank Mutual

May 1996 – January 2008

Assistant Vice President/Branch Manager

- Responsible for managing and directing all operations of branch office.
- Keep staff and branch in compliance with company standards.
- Compile and execute business plans.
- Develop and cultivate long-term business and consumer relationships.
- Ensure sufficient staffing, evaluate performances, and recommend salary increases,
- Originate consumer loans,
- Provide protection of funds, physical assets and property of branch.

St. Francis Bank

April 1994 – May 1996

Operations Supervisor/Personal Banker

- Assist branch manager with all balancing and reconciliation's.
- Supervised staff and coordinated scheduling.
- Ordered currency and balanced vault area.
- Compiled monthly reports.
- Originated and closed student loans and consumer loans.
- Performed new account functions and personal banking duties.
- Responsible for achieving and maintaining office goals.

TCF Bank

December 1991 – February 1994

Operations Supervisor

- Supervised and co-managed Bayside and Shorewood offices.
- Counseled clients on alternative investments/
- Balanced vault and teller areas.
- Monitored and tracked employee production and goals.
- Originated consumer and student loans.

Jax Navy Federal Credit Union

December 1990 – November 1991

Head Teller

- Supervised teller and vault areas.

- Balanced morning reconciliation's.
- Ordered currency and balanced vault.
- Opened and closed accounts.
- Monitored all referrals.
- Developed Excellence in Sales training course.

Education

High School Diploma

Various completed courses and UWM and MATC Milwaukee related to the financial industry

Certified Training

Insurance Agent- Health and Life Insurance

Community Affiliations

Oak Creek Little League - Board Member

Hispanic Chamber of Commerce - Member

