

Jennifer M Lamb

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Milwaukee, WI

A Motivated business professional with a successful 15-year track record of progressive customer service, sales experience and community leadership. Demonstrated ability to drive sales, improve performance, build inclusive teams and develop professionals. Is knowledgeable in sales forecasting, reporting, workload management, and process improvement. Flexible and versatile - able to maintain a sense of humor under pressure. Thrive in deadline-driven environments. Excellent effective event planning skills. Bilingual- Spanish/English. Microsoft Office- Proficient.

WORK EXPERIENCE

Branch Manager/ CRA Loan Officer
Great Midwest Bank SSB
March 2019-Present

- Evaluate the job performance of branch office staff to ensure quality of work and service to customers.
- Monitor branch activity, including number of transactions, teller errors, loan volume, recommend salary increases and customer service performance.
- Lead and coach sales activity by record keeping, training and sales goal development.
- Monitor key lending products and sales within branch to ensure profitable and sound business practices.
- Originate residential loan applications, particularly for low and moderate income borrowers and in low and moderate income CRA assessment areas.
- Develop client referral sources including realtors, home buyer counseling agencies, builders, and community leaders.
- Monitor the expedient processing of loan applications through regular contact with loan processors and manage the loan pipeline.
- Participate in community organizations with the goal of increasing CRA visibility for Great Midwest Bank SSB
- Support and execute the implementation of new regulations and Standard Operation Procedures.
- Prepared formal financial documents in accordance with legal standards.
- Ensured safety of staff while conducting branch opening and closing procedure.
- Counsel business clients and prospects on trends and conditions of the financial environment and mortgage climate.

Case Manager/Employment Developer
Employment Options LLC
March 2018-Marh 2019

- Create opportunities for career exploration through education, job shadowing, business tours, and work experiences.
- Build effective relationships with employers that will maximize a participant's likelihood of being successful, including building natural supports within the workplace.
- Support both participants and employers after job placement to ensure the highest possible participant success and employer satisfaction.

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- Maintain open and professional communication with participants, staff, families, funding sources, employers, and the business community.
- Complete and maintain all related documentation in accordance with the agency standard including monthly progress reports, employer contact logs, as well as any additional required documentation.
- Participate in assigned meetings, professional development, and training as required
- Evaluate clients work performance while managing several work caseloads.

Client Delivery Specialist/Commercial Banking

Associated Bank N.A - Milwaukee, WI

July 2016 to March 2018

Relationship/Business Banker

August 2008 to July 2016

- Facilitated implementation and billing of new products and services for new and existing clients.
- Fielded and resolved customer questions and operational errors in regards to product set-up.
- Managed the daily workflow supporting all new and incremental implementations.
- Worked directly with the clients throughout the pre- and post- implementation process while ensuring quality delivery in accordance with client service levels.
- Exceeded and met all Service Level Agreements for Treasury Management Product set-ups with accuracy and timeliness.
- Opened client deposit accounts for new and existing customers.
- Provided account maintenance for customers with complex account structures or high-profile clients.
- Conducted training sessions for new and existing clients through online services and where necessary in person at the client's location.
- Established the necessary training materials, determined the appropriate level of training detail and effectively communicated with the customer before, during and after the training sessions to ensure achievement of training objectives.
- Conducted group training sessions where needed for multiple clients in order to improve client usage of new and existing products and services.
- Matched client's technical and business needs to the bank's abilities and referred services when appropriate.
- Strategized tasks that need to be completed to onboard, troubleshoot or recommend solutions to satisfy the customers need.
- Organized, managed and executed multiple projects such as service upgrades and report monitoring.
- Partnered with Operations to ensure products/services were established, accurate billing was in place and documentation conformed to Bank standards.
- Mentored and trained other Client Delivery Specialists to ensure consistency of activities and results.

Communications Committee Leader

Associated Bank Cultural Awareness Network - Milwaukee, WI

January 2014 to March 2018

- Created and organized financial literacy exhibits and presentations for community events.
- Coordinated and plan quarterly events that promote professional development for Associated Bank's Milwaukee footprint

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- Partnered with non- profit organizations to expand connections and opportunities for the members of The Cultural Awareness Network.
- Created and wrote guidelines for the Professional Development Committee of The Cultural Awareness Network.
- Developed quarterly articles for the company's regional newsletter and colleague events.
- Conducted quarterly interviews with colleagues to be highlighted in the regions' newsletter.
- Attended community, personal and professional events while advocating for Associated Bank
- Promoted diversity and inclusion within Associated Bank.

EDUCATION

Bachelor of Science in Business Management
Cardinal Stritch University - Milwaukee, WI
December 2013

Volunteer

Milwaukee Christian Center Milwaukee
Board Secretary
2018-Present

References

Available Upon Request