

Gloria M. Márquez

Mobile: (414) 807-5526 • E-mail: gmmarquez@outlook.com

PROFESSIONAL SUMMARY

Goal-oriented individual with a pleasant personality and a tenacity that knows no restrictions. Motivated banking professional possessing a strong commitment to quality customer service coupled with superb communication skills. Builds customer loyalty by effectively resolving problems and quickly processing transactions. Finance and Banking professional successful at cross-selling Bank products, Insurances and services. Results-oriented Customer Service Professional who excels at uncovering customer needs, finding solutions and handling objections, especially in our Spanish Community. Top performer with a consistent track record of meeting and exceeding goals.

WORK HISTORY

First Pentecostal Church The Great Commission of WI Inc.
Executive Secretary

Milwaukee, WI
September 1995 – Present

- Preparation and Production of weekly bulletin, monthly newsletter (Glad Tidings) and Annual Report
- Management of the Church office and records
- Assistance with Financial Operations
- Servings as in-person and telephone receptionist
- Provide administrative support for Pastor, Church Staff and Session
- Maintenance of the Church Calendar Preparation
- Works closely in collaboration with all the church ministries team, other staff, and volunteer teams to facilitate cohesive coordination and implementation of ideas, planning, programming and decisions.

Regional Finance
Branch Manager

Greenfield, WI
November 2018 – Present

- Manages and inspires team members to perform to their full potential, thus driving branch profitability.
- Exercises a degree of independent judgment in making decisions affecting employees and the work of the branch within company policy guidelines and District Supervisor oversight.
- Subject matter expert on our personal loan product offerings in order to present loan solutions to current and potential customers that help them achieve their financial goals.
- Creates and maintains branch operations solvency by the control of assets, proper credit extension, and proper follow-up and counseling of past-due customers.
- Establish and build customer relationships through delivering exceptional service.
- Assigns duties to employees and frequently examines their work for accuracy, neatness, timeliness and maintaining efficiency by training employees and adjusting errors.
- Trains and develops employees with regard to current and new branch operations, company policies, procedures, and laws governing the consumer finance business.
- Works with Recruiting and District Supervisors to address branch staffing needs.
- Cultivates new relationships with local retail businesses. Partners with Account Managers to maintain strong relationships with current retail businesses, handle complaints and trains business partners in company policies and procedures

Associated Bank
AVP, Bilingual Branch Manager

Milwaukee, WI
January 2008 – September 2018

- Develop new consumer and small business relationships by prospecting new households and businesses while growing existing customer relationships.
- Recruit, hire and develop staff through ongoing coaching sessions, to ensure that all are personally committed to consistently exceeding customer expectations every time, everywhere.
- Plan, direct and control bank operations, ensuring that established policies, procedures and compliance requirements are consistently followed.

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- Maintains control and supervision of excellent customer service delivery within the branch to achieve established customer service targets.
- Work closely with different organizations throughout the City of Milwaukee by facilitating Bank at Work presentations that help bring financial awareness and place Associated Bank at their primary bank.
- Worked directly with Associated Mortgage (CRA), Associated Investments, Associated Business / Commercial Banking and Private Banking to achieve sales and deposits goals
- Increased YOY new bank relationships within the local community by executing quarterly promotions.
- Engaged employees in business processes with positive motivational techniques.
- Maintained friendly and professional customer interactions.
- Assessed employee performance and developed improvement plans.
- Maintained confidentiality of bank records and client information.
- Complied with regulatory requirements including Bank Secrecy Act, Anti Money Laundering, OFAC, USA Patriot Act, Privacy Act and Community Reinvestment Act.
- Teamed with different employers facilitating Bank at Work program, presenting a valuable package of products and services available to employees of businesses through the Associated Bank footprint who choose to have their payroll check automatically deposited into an Associated Bank checking account. Presentations done both Spanish and English

JPMorgan & Chase Bank
VP Branch Manager

Milwaukee, WI
August 2004 – January 2008

- Demonstrate leadership proficiency in sales, services and operations.
- Build and maintain consumer and business relations.
- Track record of developing and coaching high performance Sales and Service teams.
- Participate in all business level of business management orientation, sales planning and strong team-building skills.
- Show strong listening, analytical, problem solving and decision-making skills to effectively uncover and resolve complex customer and employee issues.
- Ensure that the branch meets and/or exceeds a daily sales goal, which includes checking, savings, loans/lines, investments and credit cards.
- Directly coaching and developing the Assistant Branch Manager, Personal Bankers, and Sales and Service Associates.
- Bilingual Spanish Representative actively working throughout the City of Milwaukee facilitating Financial Literacy presentations.

Auto Finance Manager – Call Center

October 1997 – August 2004

- Performed and analyzed quality levels of production through use of historical trend results, focusing on reducing loss / delinquency, quality and customer service.
- Develop and manage the Bilingual (Spanish/English) an internal Call Center that supports multiple sites and products as it relates to monitoring requirements.
- Developed appropriate audit plans, communicated and implemented solutions to identified control related issues to assist management team.
- Developed quality employees within the call center to take over leadership positions.
- Strategically scheduled team members to maintain optimal staffing levels at all times.
- Answered customer telephone calls promptly and in an appropriate manner.
- Created clear and effective policies governing all aspects of employee work and interaction with customers.
- Determined quality assurance benchmarks and set standards for improvement.
- Handled claims consistent with client and corporate policies, procedures, best practices and regulations.
- Fostered a positive work environment by consistently treating all employees and customers with respect and consideration.
- Recognized and rewarded outstanding work performance to cultivate a positive and collaborative customer service culture.
- Trained and mentored new employees on collection methods, documentation requirements and performance strategies.
- Established procedures for collection of past due amounts.
- Worked with legal resources and recovery teams to manage default issues.

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EDUCATION

University of Cardinal Stritch
Bachelor of Science Business Administration

Milwaukee, WI
Human Resources & Management

SKILLS

- Bilingual – Spanish / English
- Staff development & management
- Extremely Organized
- Self-Motivated
- Business Development
- Cash handling and management
- Skilled problem solver
- Goal- oriented
- Customer Service
- Team leadership & motivated team player

ACCOMPLISHMENTS

- Mayoral appointee for Business Improvement District No. 4 – as Executive Board member currently service as the Treasurer in the City of Milwaukee
- Ranked top 5 branches in YOY Sales and Revenue goals
- Four Relationship Bankers that I managed earned the Star Achievement Sales Award
- Throughout my banking career 7 employees were promoted to a Management and Executive within the company and overseas.

CERTIFICATIONS / LICENSES

- Certified Banker – Through Associated Bank University Program
- Certified Business Banker – through Associated Bank University Program
- Wisconsin Credit Insurance