**SUMMARY OF QUALIFICATIONS**

* Over 20 years of experience in Sales and Account Management, including over 10 years of experience in the financial services sector and 7 years of experience as a manager.
* Proven expertise in administrative processes, sales management, and customer service to achieve an increase in sales and customer loyalty in the financial services, insurance, and retail fields.
* Extensive experience autonomously designing monthly and annual workplans that include budget, forecast, presentations, reports, commercial schedule, and sales goals.
* Experience monitoring indicators of service and sales to make business decisions, which resulted in sales goal fulfillment and client retention.
* Demonstrated ability in interpersonal relations and people management.
* Effective negotiation and leadership skills, with strategic acumen for leading growth opportunities.
* Ability to strategize and prioritize effectively to accomplish multi-tasks and work well under pressure.
* Proficiency with various computer applications including MS Office (Word, Excel, PowerPoint, Outlook), AS/400, Exceller and Internet.

**WORK EXPERIENCE**

**Sales Coordinator, Personal Loans**2014 – 2015

Manpower. Helm Bank, Bogotá, Colombia.

* Developed a new market by managing a new team including the whole hiring process. Familiarized employees with market and banking solutions, resulting in a committed staff with turnover below 10%.
* Delivered exceptional customer service to 50 corporate clients by engaging in active listening and providing timely responses to queries. This resulted in high client retention rates and repeat business.
* Reactivated and deepened existing agreements between the bank and corporate clients; managed employees of 20 key clients with a monthly disbursement of CAD 600K in personal loans by building solid relationships and analyzing data.
* Created and developed sales and marketing strategies resulting in a 10% increase in monthly disbursements.

**Financial Branch Manager, Financial Retail** 2013 - 2014

Ripley Financing Company, Bogotá, Colombia.

* Managed a staff of over 40 employees from the hiring process to training them with banking products.
* Achieved exceptional customer service by technical knowledge and empathy to understand and identify the client needs, resulting in client retention and repeat business over 75% monthly.
* Achieved effectiveness in insurance and credit placement rate consistently of the 8% target over store sales daily, by creating and developing sales strategies like approaching clients on the retail floor, contests, incentives, and challenges for the sales force.
* Leaded workflow by following up on processes, ensuring a safe environment of theft prevention.
* Monitored KPIs including staff turnover, month-over-month sales, retail sell-through rate, customer conversion rates, and average time to close issues, among others.

**Regional Sales Manager, Financial Retail** 2011 - 2013

Tuya–Bancolombia, Bogotá, Colombia.

* Coordinated hiring process and provided staff training for 300 sales, customer service, and back office specialists.
* Leaded 20 supervisors, who each managed a branch location within the territory. Resulted in the region achieving #1 position in the country due to 130% execution of assigned sales goals in 2011.
* Attained a 30% growth in credit placement within the territory from 2011 to 2012 by developing sales strategies and new options, including challenges, contests, and incentives, to improve productivity.
* Winner of top regional sales manager in BNP Paribas Cardif insurance sales in 2012.
* Monitored KPIs including year-over-year sales, staff turnover, and customer conversion rates among others to make business decisions.
* Managed a staff team, acting as workflow coordinator. Ensured a safe environment, in accordance with laws and regulations, including theft prevention.

**Territory Sales Coordinator, Direct Sales** 2010 - 2010

Kimberly Colombia SA, Bogotá, Colombia.

* Initiated and consolidated a freelance team by hiring process, training, and continuous coaching.
* Created highly targeted marketing strategies and events to maintain excellent relationships with over 100 salespeople and brand positioning for new markets.
* Created reports to analyze data including sales history of products, different types of channel sales and other companies to make business decisions, resulting in substantial franchise growth of 50% and sales growth of 30%.

Territory Manager, Direct Sales 2008 – 2010

Nutresa Group.Novaventa SAS, Bogotá, Colombia.

* Managed a team of freelance staff by selection and providing continuous training, which resulted in an established and committed team.
* Created and developed marketing and sales strategies to motivate resellers including incentive plans, contests, and several events. Led to position as #1 territory for fulfillment of sales goals in Bogotá region, with 80% increase in sales revenue and 78% customer retention in the year.
* Designed monthly workplans, making business decisions through performance monitoring and data analysis that resulted in 100% achievement of sales goals.

**Technical Analyst**  2004 – 2007

AIG General Insurance SA, Bogotá, Colombia.

* Managed the day-to-day **Citibank** Colombia bancassurance account as a branch of the insurance company. Handled underwriting and policy issuance process.
* Provided overall performance support by sharing knowledge of personal lines insurance to address technical policy requests and requirements.
* Provided support to the **Citibank** salesforce, which increased billing sales by 35% monthly.
* Achieved customer service indicators of 100% on timely response and customer satisfaction through the Exceller platform.

**Commercial Assistant** 2002 - 2004

Delima Marsh (Bogotá, Colombia).

* Managed corporate insurance accounts for several multinational clients like IBM, Alpina, Unisys, Abbott, Mazda, among others.
* Consolidated and compared various policy options to determine which would best suit client needs and provided extensive explanation and support about available policy options.
* Analyzed risks and liabilities to determine clients needs based on proper level of coverage and price.
* Achieved a customer retention indicator of over 70% by developing excellent client relationships and providing the right advice and overall support.

**EDUCATION & TRAINING**

Financial Analysis & Investment Management Certificate In Progress

University of Toronto, School of Continuing Studies, Toronto, ON

Bachelor of Business Administration 2008

De la Salle University, Bogotá, Colombia

Equivalent to 4-year Bachelor’s degree in Canada through University of Toronto credential assessment.

**Continuous Learning**

ENW Program. World Skills, Ottawa. 2022

English Semi-intensive Program. YMCA Montreal, Virtual. 2021

English as a Second Language. Algonquin College, Ottawa, ON. 2017

French as a Second Language. CEGEP, Drummondville, QC. 2015