

Joanne Conry

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EMPLOYMENT

GENERALLI PANEUROPE DAC / UTMOST WEALTH SOLUTIONS

SENIOR CORPORATE CUSTOMER SERVICE ADMINISTRATOR

MARCH 2016 - PRESENT

For the past 5 years, I have worked in the operations department with the CCS Back-Office Support Team. **The main responsibilities:**

- Responsible for managing the daily tasks associated with Operations for the Wealth Protection business line.
- Work within the team structure to take accountability for tasks delegated to you and adherence to procedures.
- Communicating with Partners, Policy Holders; and related parties ensuring the Service Level Agreements (SLA).
- Manage queries, issue log, and ensure accurate information.
- Handle incoming queries in a timely and professional manner.
- Ability to identify issues and escalate them to Team Leader.
- Ensuring that all AML and regulatory requirements are met according to the Central Bank of Ireland and the Company's standards.
- Monitor the relationships and identify any issues affecting customer satisfaction; and report same to line management.
- Working as part of a team, responsible for collection of cash.
- Manage and maintain the daily bank statements.
- Manage the collections and reconciliations.
- Manage the business partner fees and payments.
- Communicating effectively with key stakeholders within the department and in other departments within the company such as Finance/Actuarial/Investment Control.
- Responsible for bank reconciliation, chasing down debt by utilising both phone and email communications.
- Able to work independently whilst still fitting in with the overall team plan and structure.
- Ad-hoc administration duties and project work as required.

BANK OF IRELAND GROUP

CUSTOMER SERVICE / DEPUTY CUSTOMER SERVICE MANAGER AND PROJECT MANAGER

JULY 1999 - JANUARY 2015

For over 15 years, I worked across a wide area of the bank's business areas. From an initial customer service role within the 24-hour call centre, I have worked in consumer lending, foreign exchange, business banking and latterly credit card underwriting. I have also been the Deputy Customer Service Manager and Project Manager for the bank. This required a large amount of flexibility on my part, and I have placed great pride in being able to adapt to not only the varied working practices within the Bank, but also the scale of regulatory change over the 15 years of my employment.

The main responsibilities:

- To act as the face of the company, always maintaining a professional manner and building rapport and trust with the clients.
- Make considered decisions for customers based on personal circumstances and available data.
- Ensure all regulatory guidelines are adhered to, ensuring customers are treated with fairness and openness.
- Work to strict deadlines in turning around customer applications, ensuring clear and concise reasoning behind decisions are available.
- Collate and analyse MIS, identifying key trends in lending.
- Dealing with a high volume of customer transfers requests, both domestic and international. Accuracy, attention to detail, KYC principles and the ability to work to various deadlines throughout the day was key to the role.
- A/C opening for new and existing customers with adherence to strict money laundering procedures and customer due diligence.
- Ability to adhere to deadlines while being flexible to the needs of the branch and individual, demonstrating a positive attitude while adopting a strong, flexible & patient Approach to coaching.
- Experience working with our high-net-worth customers in all the savings and investment needs.

Notable Achievements:

- Promoted to Deputy Customer Service Manager.
- Large scale project to “computerize” all bank mandates.
- Responsible for team of 20 staff, setting goals and expectancies.
- Interviewing and training of new recruits as part of initiative to amalgamate all back-office operations within BOI Group.

**EUROHAUL HEATEQUIP GROUP
CUSTOMER SERVICE / RECEPTIONIST
MAY 1996 - JULY 1999**

For two years, I worked for this family owned and run Warehousing/Haulage Company in their customer service/reception area.

The main responsibilities:

- Data entry - recording and maintaining concise accurate inventory of all warehousing stock.
- Organizing the daily runs for all drivers.
- Answering calls in a professional and timely manner.
- To act as the face of the company while covering the reception area - making sure all customer queries were handled in a timely and responsible manner.

PROFILE

- Highly motivated professional with an excellent work ethic.
- Proven track record of leadership and teamwork skills. Superior written and verbal skills developed through work experience and academic pursuits.
- Self-motivated person with excellent computer skills and experience in all aspects of day-to-day banking and administrative roles.

EDUCATION

2006: QFA Diploma
Institute of Bankers, IFSC, Dublin 1, Ireland

IT SKILLS

Highly proficient in Microsoft Word, Power Point, Access and Excel; Citrix; Mortgage Link; Credit link; Loan Origination; Insight; CRM; and Enate.

HOBBIES/INTERESTS

Walking, reading and socialising with friends and family.

References available upon request