

Bobby Morales

MANAGEMENT

Profile

ICPM-certified manager with eight years of experience in client services and a passion for innovative performance management strategies. Fosters team collaboration to increase productivity and staff retention. Proven track record of implementing tailored solutions for optimal client services, ensuring a positive and consistent client experience.

Professional Experience

June 2018 – present

JClient Services Manager
JPMorgan Chase, Jersey City, NJ

- Lead a dynamic team of 25 client support specialists using the company's coaching and development plan to drive efficiency
- Analyze and interpret client data to identify trends and develop department strategy
- Implement client service strategies, leading to a 20-point increase in satisfaction scores
- Foster an inclusive work environment that encourages team collaboration to reduce staff turnover by 20%
- Collaborate with stakeholders to effectively resolve client issues and escalations

October 2014 – May 2018

Operations Manager
JPMorgan Chase, Paramus, NJ

- Demonstrated outstanding leadership through coaching and empowering employees
- Achieved a consistent customer satisfaction rating of 95%, exceeding the company benchmark of 90%
- Fostered a customer-centric culture by conducting regular team training sessions on delivering personalized service
- Led the branch to receive the "Customer Excellence Award" for two consecutive quarters
- Collaborated with regional managers to align branch strategies with broader goals

Key Skills

- Conflict resolution
- Customer-centric service
- Customer relationship management (CRM) systems
- Financial analysis
- Operational efficiency
- Performance management
- Strategic planning
- Team leadership

Education

September 2010 – June 2014 **Bachelor of Science (B.S.) in Management**
New Jersey City University, Jersey City, NJ

Certifications

- Certified Manager (CM), ICPM, 2022
- Certified Anti-Money Laundering and Fraud Professional (CAFP), ABA, 2021