

JASON L. SMITH

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INFORMATION SYSTEMS & SALES SUPPORT PROFESSIONAL

Banking, Finance, Real Estate, Healthcare

Strategic and solutions-oriented Information Systems leader successful in analyzing processes, increasing efficiencies, mentoring and leading teams, and creating/implementing management information solutions to save revenue and improve operational performance; champion of change management and process improvements. Combines astute strategic, business, technology, and leadership skills with proven success in leveraging technology to support business objectives and drive organizational excellence. Strong and decisive leadership competencies, yet flexible in responding to constantly changing organizational demands.

Expertise Includes:

Information Systems / Process Improvement / Global Sales Support / Team Leadership / Market Analysis / Reporting System Design & Improvement / Reengineering / Technical Support / Training & Development / Sales Forecasting

PROFESSIONAL EXPERIENCE

ABC BANK & COMPANY, New York, NY 1995 to Present
American global securities, investment banking and retail banking firm with nearly \$2 trillion in assets, more than \$102.6 billion in annual revenue, and nearly 240,000 employees – 2nd largest bank (market cap); 3rd largest deposit base.

Executive Director, Sales Infrastructure, TSS Sales Finance – Treasury Securities Services (2006-Present)
Vice President, CRM/Market Analytics Manager, New Business Development – Investor Services (2003-2006)
Assistant Vice President, Sales MIS Associate, New Business Development – Investor Services (2000-2003)
Second Vice President, Credit MIS Analyst, Global Markets Credit – Investment Bank (1999-2000)
Second Vice President, Credit Analyst, Portfolio Asset Management – Commercial Real Estate Finance (1998-1999)
Assistant Treasurer, Training Officer, Loan Administrator, Loan Accountant – Commercial RE finance (1995-1998)

Highly successful 22+ year tenure with JPMorgan. **Promoted and/or transferred through a series of increasingly responsible positions** based on strong performance. Earlier career responsibilities included developing system tools, improving processes, creating databases, remedying issues, enhancing reporting, managing budgets, **leading teams of 10+**, and more. Currently responsible for developing/managing the banks' sales tools (CRM, etc.), analyzing critical data, and training/supporting end-users.

Executive Director, Sales Infrastructure, Treasury Securities Services (2006 to Present)

- Successfully streamline processes and improve procedures to support targeted business objectives throughout the organization.
- Worked in cooperation with Technology team to design/implement comprehensive reporting platform to launch multi-faceted automated report distribution facility; supports sales management, product, finance, and strategy teams (2200+ reports emailed from this tool on a weekly basis; utilized by 300+ people).
- **Improved the Sales organization's performance, reduced expenses, and increased efficiencies** by developing/implementing share of wallet and market analytics tool.
- Directed the design and execution of web based revenue calculation tool to help product finance teams facilitate new business forecasting efforts and validate sales compensation rates.

Vice President, New Business Development/CRM/Market Analytics Manager, Investor Services

- **Successfully supported more than 300 end-users** by designing, implementing, and managing Global Customer Relationship Management (CRM) platform.
- Created automated reporting platform that standardized sales and client reporting by leveraging email and web-based report distribution.

ABC BANK & COMPANY (Continued):

Assistant Vice President, New Business Development/Sales MIS Associate, Investor Services

- Significantly improved global sales reporting to facilitate Investor Services sales and Client Management teams in Asia, Europe, and North America. Served as key CRM system Project Team member.
- Developed prospective database for Investor Services Sales management team and served as key CRM Project Team member. Achieved "**Service All Star**" award.

Second Vice President, Global Markets Credit/Credit MIS Analyst, Global Portfolio Management

- Created centralized management reporting tool for credit process review monitoring and control; reporting capability allowed for information retrieval from various internal/external sources.
- **Re-engineered mutual fund analysis risk review process** by designing strategic data collection tool that calculated proposed risk grades and reviewed new and existing credit facility limits; application streamlined process and **saved 60% in work hour costs**.
- Developed and implemented systematic FX block trade distribution method that successfully remedied long-standing audit exception issue.

Second VP, Portfolio Asset Management/Credit MIS Analyst, Portfolio Asset Management

- Streamlined commercial real estate asset data processing to save significant expenses and increase efficiencies, and successfully developed and managed Senior Credit Officers' database.

EDUCATION / TECHNOLOGY

BS – Finance, STATE UNIVERSITY OF MASSACHUTES, Boston, MA

Proficient in Microsoft Word, Excel, PowerPoint, Access, Project, Visio, Outlook; Business Objects Reporting Suite; Lotus Notes; Salesforce.com; and Cognos