

PROJECTS

Strategy Development and Execution

Developed strategic plan, aligned departments and personnel and improved communication and tracking of the plans

Branch Delivery Scorecards

Developed scorecards for branch and call center with alignment to the performance appraisal system.

Call Center Service Turn-around

Identified opportunities, developed & implemented strategies that significantly improved the service levels.

Developed Strategic Plans for the following areas:

Online Banking Services
Lending (Mortgage & Consumer)
Knowledge Management
Human Resources
Information Technology
Service Delivery (branch and call center)
Call Center

Performance Management Strategy

Developed an overall performance management strategy including ongoing communication, coaching and alignment with performance appraisals.

Project Management Process and Training

Developed and trained a practical process for prioritizing and managing projects that led to better teamwork and more projects being completed.

Employee Helpdesk

Designed and implemented an employee help desk including knowledge management resources, an intranet and specialists to support all operations and technology inquiries.

Remote Delivery Strategy

Designed and implemented a strategy that included integrating the systems of telephone and online banking with the support personnel for the call center and e-mail support.

Lending Strategy, Reorganization, Process and System Implementation

Evaluated systems and processes identified opportunities for improvement, selected new consumer and mortgage lending vendors and implemented improved systems and centralized lending environment.

TRAINING & DEVELOPMENT

Organization Development

Training:

- Organizational Assessment
- Strategic Planning
- The Trust Factor
- Principles of High Performance
- Developing High Performance Teams
- Skills for High Performance Teamwork
- Self Mastery
- High Performance Leadership

Personal Development Training:

- Positive Impact Program
- Self Mastery
- Principles of Partnership Selling
- Core Skills

Management Development

Training:

- Career Builder Program
- Principles of High Performance Leadership

Workshop Curriculum:

- Leading People through Change
- Building Your Team for Success
- Leading Through Trust
- Art of Negotiation
- Communication with Skill
- In Pursuit of Goals
- Hiring for the 21st Century
- Learning to Control Stress
- Time Management
- Coaching Your Team
- Resolving Conflicts the Right Way
- Becoming Customer Focused

For more information contact:

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