| **David Lucas** |
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|  | ProfileExperienced in sales, relationship management, and manufacturing. Expert in building relationships with customers and building brand value. |
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|  | Employment HistoryRelationship Banker at JPMorgan Chase, San JoseNovember 2023 — Present* **Customer Relationship Management**: Developed and maintained meaningful customer relationships by identifying financial needs and recommending appropriate solutions, resulting in enhanced client satisfaction and retention.
* **Proactive Customer Engagement**: Managed assigned clients through in-person meetings and phone consultations, consistently building trust and rapport while discovering opportunities to meet their financial goals.
* **Cross-Selling & Product Expertise**: Demonstrated expertise in Chase products and services, educating customers on banking solutions, and facilitating access to digital self-service tools, improving customer convenience and satisfaction.
* **Collaboration with Specialists**: Partnered with internal Financial Advisors, Mortgage Bankers, and Business Relationship Managers to provide customers with specialized financial solutions tailored to their needs.
* **Regulatory Compliance**: Ensured strict adherence to all banking policies, procedures, and regulatory requirements, maintaining operational integrity and reducing risk.
* **Customer-Centric Communication**: Leveraged excellent communication skills, both in-person and over the phone, to effectively explain product features and benefits, tailoring solutions to meet diverse customer needs.
* **Technological Advocacy**: Assisted clients in adopting and utilizing Chase’s digital banking platforms, empowering them to manage their accounts with ease 24/7.
* **Consultative Sales Approach**: Utilized a consultative approach to provide customized financial options, helping customers make informed decisions about their financial health.
* **Organizational Efficiency**: Maintained professional and organized follow-up procedures to ensure consistent client interaction and service delivery.
* **Team Collaboration**: Engaged with team members and other businesslines to ensure clients were connected to the most suitable banking products and services.

Senior Manufacturing Technician at Sciton Inc., Palo AltoDecember 2021 — November 2023* **Technical Product Proficiency**: Gained comprehensive understanding of intricate laser products, materials, and components
* **Inventory and Material Oversight**: Managed material preparation and assembly processes, ensuring precise inventory levels, optimal quality control, and streamlined material flow
* **Cross-Functional Collaboration**: Fostered collaboration with diverse teams, from engineering to supply chain, ensuring timely task completion, efficient problem resolution, and continuous process improvement
* **Problem-Solving Expertise**: Led troubleshooting initiatives for equipment, devices, and product challenges, drawing parallels with the requirements of identifying and rectifying supply chain gaps
* **Safety and Compliance**: Adhered to stringent safety protocols and standard operating procedures in a manufacturing environment, reinforcing a commitment to workplace safety and operational excellence
* **Bill of Materials (BOM) Management**: Worked closely with engineering and production teams to maintain and update BOMs, ensuring accurate representation of components and fostering efficient manufacturing processes
* **NetSuite Proficiency**: Utilized NetSuite ERP system for inventory management, order processing, and production scheduling

Sales & Operations Specialist at AT&T, Santa ClaraSeptember 2017 — December 2021* **Inventory Management**: Maintained optimal inventory levels, ensuring rapid response to customer needs and achieving flawless audit outcomes
* **Sales and Customer Service**: Consistently surpassed monthly sales goals, achieving over 110% performance Month Over Month, highlighting a commitment to customer success and operational excellence
* **Data Management**: Efficiently utilized Salesforce for tracking referrals and appointments
* **Collaboration & Training**: Played a pivotal role in employee training, emphasizing the importance of customer service, upselling techniques, and process adherence, underscoring a commitment to team success and knowledge sharing
* **Customer-Centric Communication**: Optimized customer interactions across multiple channels, including in-person, email, and phone, ensuring a high-quality customer experience
* **Order Prioritization**: Developed strategies to prioritize sales orders, ensuring prompt fulfillment and enhancing overall operational efficiency
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|  | EducationB.S. Business, Management Information Systems, San Jose State University, San JoseAugust 2023 — PresentA.A. Business Administration, De Anza College, CupertinoSeptember 2021 — June 2023H.S. Diploma, Westmont High School, CampbellAugust 2011 — June 2015 |
|  | Courses & CertificationsMicrosoft Office, De Anza CollegeAugust 2021 — December 2021Google Suite, De Anza CollegeAugust 2021 — December 2021Laser Alignment & Optics, San Jose City CollegeJanuary 2022 — May 2022Data Analytics, GoogleCompleted November 2nd 2023SIE, Series 6, Series 63, and California Life Insurance ExamsDecember 2023 - March 2024 |

 | DetailsCampbell, CA, (408) 564-3432delucas314@gmail.comSkillsAdvanced Inventory Quality ManagementProficient in MS Excel and ERP SystemsAnalytical and Problem-Resolution AbilitiesEffective Work Planning and Task PrioritizationExceptional Verbal and Written CommunicationCollaborative Cross-Functional TeamworkCustomer-Centric ApproachProcess Improvement and OptimizationRigorous Quality Assurance PracticesStrategic Sales and Market Expansion |