| **David Lucas** | |
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| |  | Profile Experienced in sales, relationship management, and manufacturing. Expert in building relationships with customers and building brand value. | | --- | --- | |  | Employment HistoryRelationship Banker at JPMorgan Chase, San Jose November 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 Alto December 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 Clara September 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 | |  | EducationB.S. Business, Management Information Systems, San Jose State University, San Jose August 2023 — Present A.A. Business Administration, De Anza College, Cupertino September 2021 — June 2023 H.S. Diploma, Westmont High School, Campbell August 2011 — June 2015 | |  | Courses & CertificationsMicrosoft Office, De Anza College August 2021 — December 2021 Google Suite, De Anza College August 2021 — December 2021 Laser Alignment & Optics, San Jose City College January 2022 — May 2022 Data Analytics, Google Completed November 2nd 2023 SIE, Series 6, Series 63, and California Life Insurance Exams December 2023 - March 2024 | | Details Campbell, CA, (408) 564-3432  [delucas314@gmail.com](mailto:delucas314@gmail.com) Skills Advanced Inventory Quality Management  Proficient in MS Excel and ERP Systems  Analytical and Problem-Resolution Abilities  Effective Work Planning and Task Prioritization  Exceptional Verbal and Written Communication  Collaborative Cross-Functional Teamwork  Customer-Centric Approach  Process Improvement and Optimization  Rigorous Quality Assurance Practices  Strategic Sales and Market Expansion |