YVONNE WALSH
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Credit Union professional with 12 plus years of experience as a Branch Manager. Provided outstanding member services thanks to in depth knowledge of financial services offered by Charter Oak Federal Credit Union. Strong leadership skills to promote strong staff loyalty, communication is key. Knowledge of revenue, business development, finance, regulatory requirements, and general bank operations. Proficient multi-tasker and team leader with attention to details and sales oriented.

EXPERIENCE

JULY 2022-CURRENT
PROMOTED TO BRANCH OFFICER, CHARTER OAK CREDIT UNION

- OVERSEEING SECOND HIGHEST VOLUME BRANCH IN CHARTER OAK FCU. IN THE 3RD QUARTER OF 2022 EXCEEDED BRANCH GOAL AT 122.96%. IN THE 4TH QUARTER OF 2022 EXCEEDED BRANCH GOAL AT 106.63%. IN THE 1ST Q OF 2023 MET OR EXCEED BRANCH GOAL IN ALL CORE PRODUCTS.

SEPTEMBER 2012-JULY 2022
BRANCH MANAGER, CHARTER OAK FEDERAL CREDIT UNION

- Responsible for achieving Branch sales goals.
- Responsible for retention of sales goals through Huddles, Skills Coaching, Check-Ins, Skill Builders, and Sales Routines.
- Support growth in the Branch by identifying cross-sell opportunities, deepening relationships and increasing member retention.
- Effectively manage existing relationships in order to sustain growth.
- Utilized relationship management by networking to achieve growth and meet benchmarks.
- Continuously train and develop knowledge of Credit Union operations, compliance, procedure, and security.
- Train, coach and mentor employees through onboarding, APEX, policies and procedures.
- Provide construction feedback for team/employees through APEX routines and performance reviews.
- Promoting the Credit Union services to attract new members.
- Mentored and coached several Assistant Branch Managers to a higher level of management.

SKILLS

- Strong analytical skills necessary to evaluate credit union requests and prepare budgets.
- Demonstrated ability to work within and develop my team.
- Proven commitment to quality of member services
- Ability to proactively solicit new business.
- Thorough product knowledge to fit the needs of our membership
- Thorough knowledge of regulatory, policy and compliance issues
- Strong background in sales and sales management practices
- Ability to manage multiple tasks/projects and deadlines simultaneously.
- Ability to resolve complex problems with minimal guidance.
- Strong communication skills with members, team, and management.
- Knowing the strengths of each team/employee to appropriately delegate tasks or projects to accomplish in a timely manner.

CERTIFICATIONS, LICENSES, AND ACCOMPLISHMENTS

- Notary Public
- Medallion Certified up to $250K.
- Licensed to sell life and disability on selective loans.
- Completed CT Credit Union League's Executive Education Program
- Completed CT Credit Union League Advance Supervisor Course
- Nationwide Multistate Licensing System NMLS
- Three out of six years on the Leadership Team of Business Networking International
- From 3rd Q of 2014 to 2nd Q of 2021, I averaged an overall of 115.73% of meeting Branch Sales Goal.
- 3rd Q of 2021 no goals due to pandemic.
- 4th Q of 2021 to 1st Q of 2023 met or exceed overall sales goals.