

# Briana C. Cowley

---

(310) 702-9917 | iam.bricamille@gmail.com

## Objective

Highly motivated and results-oriented professional seeking a dynamic role that integrates operations, sales support, and client services. With a proven track record of optimizing operational efficiencies, providing exceptional sales support, and delivering superior client experiences, I am eager to leverage my diverse skill set and strategic mindset to drive business growth and success. Passionate about collaborating to streamline processes, exceed sales targets, and cultivate long-term client relationships, I am committed to making a positive impact and contributing to the success of the organization.

## Experience

### **NIB DIRECT | CLIENT SUCCESS MANAGER | APRIL 2023 – FEBRUARY 2024**

- Developed and maintained strong relationships with clients, serving as the primary point of contact for all their needs and inquiries.
- Conducted comprehensive client assessments to understand their campaign goals, risk tolerance, and marketing preferences.
- Provided personalized advice and recommendations tailored to each client's unique criteria and objectives.
- Monitored and reviewed client portfolios regularly, adjusting as needed to optimize performance and minimize risk.
- Proactively identified opportunities to deepen client relationships, supported all sales efforts and identified opportunities to cross-sell additional products and services.
- Resolved client inquiries and concerns promptly and effectively, ensuring a high level of satisfaction and retention.
- Collaborated with internal teams, to deliver comprehensive solutions and insights to clients.
- Maintained accurate client records and documentation in compliance with regulatory requirements and company policies.

### **CITY NATIONAL BANK | ABL AUDITOR JR. | JANUARY 2022 – MARCH 2023**

- Conducted onsite visits and inspections of collateral assets to validate their existence, condition, and market value.
- Reviewed and analyzed financial statements, aging reports, and other documentation to verify the accuracy and validity of collateral data.
- Conducted thorough audits of collateral assets, including accounts receivable, inventory, equipment, and real estate, to assess their value and quality as collateral for loans.
- Identified discrepancies, deficiencies, or potential risks in collateral documentation or valuation methodologies and recommended corrective actions or risk mitigation strategies.
- Assessed the creditworthiness of borrowers and the adequacy of collateral coverage to mitigate lending risks and ensure compliance with lending policies and regulations.
- Evaluated the effectiveness of internal controls and procedures related to collateral management and recommended enhancements or improvements as needed.
- Prepared detailed audit reports summarizing findings, observations, and recommendations for senior management and stakeholders.

### **UMPQUA BANK | ABL OPERATIONS MANAGER | OCTOBER 2020 – DECEMBER 2021**

- Led a team of asset-based lending specialists, providing guidance, coaching, and mentorship to ensure the successful execution of lending transactions and the achievement of team goals.
- Introduced and implemented cloud-based platforms to streamline daily operational efforts.
- Oversaw the underwriting and due diligence process for asset-based lending transactions, including collateral analysis, financial statement review, and risk assessment, to mitigate credit risk and maximize portfolio performance.
- Developed and implemented strategies to streamline lending operations, improve efficiency, and enhance the client experience, resulting in increased productivity and client satisfaction.
- Collaborated with cross-functional teams, including credit risk management, legal, and operations, to facilitate seamless deal execution and ensure compliance with regulatory requirements and internal policies.
- Acted as a subject matter expert on asset-based lending products and services, providing training and support to team members and stakeholders and contributing to the development of best practices and process improvements.

### **CITY NATIONAL BANK | ABL COLLATERAL ANALYST | NOVEMBER 2018 – SEPT. 2020**

- Manage a portfolio of both Traditional and Non-Traditional ABL deals, ensuring receipt of mandatory monthly reporting, and issuing retrieval requests in accordance with loan agreements as necessary.
- Perform the analysis of client collateral reports to accurately calculate the precise borrowing base pursuant to policy, assessing risks, ineligibility, availability, and variances.
- Execute monthly Production and High-Risk reports to be delivered to the Account Analysis department and other Commercial Banking Executives.
- Perform pro-forma borrowing base reviews according to ABL standard and per the request of regional offices for prospective clients.
- Align monthly collateral reviews with bi/annual audits as released per policy.
- Rendering Client Instruction Sheets for all assigned accounts to outline the collateral structure and adhere to documentation with ease.
- Support the department in developing and nurturing a good rapport with each client, meeting the company's needs, while adhering to ABL policies.

### **CITY NATIONAL BANK | RESEACH & SALES OFFICER | OCTOBER 2016 – OCTOBER 2018**

- Provided comprehensive sales support to the sales team, including order processing, quote generation, and sales contract management, resulting in improved efficiency and customer satisfaction.
- Assisted with lead generation activities by identifying and qualifying potential leads through research, cold calling, and email outreach, contributing to increased sales pipeline and revenue growth.
- Acted as a liaison between sales representatives, customers, and internal departments to ensure timely resolution of inquiries, order discrepancies, and customer issues, fostering positive relationships and trust.
- Managed CRM system and maintained accurate customer records, sales data, and pipeline information, enabling effective sales tracking, reporting, and forecasting.
- Prepared sales reports, presentations, and proposals for sales meetings and client presentations, providing valuable insights and supporting the sales team's strategic initiatives.

- Supported marketing efforts by coordinating the distribution of marketing materials, organizing promotional events, and assisting with digital marketing campaigns to enhance brand awareness and lead generation.
- Conducted market research and competitive analysis to identify market trends, customer needs, and competitive threats, informing sales strategies and business decisions.
- Provided training and support to sales team members on CRM systems, sales processes, and product knowledge, ensuring alignment and consistency across the sales organization.
- Collaborated with cross-functional teams, including marketing, product development, and customer service, to address customer needs, resolve issues, and drive customer satisfaction and retention.
- Assisted with sales forecasting, budgeting, and goal-setting activities, contributing to the development and execution of sales strategies and initiatives.

#### **CITY NATIONAL BANK | ADMINISTRATIVE SPECIALIST | SEPT. 2014 – SEPT. 2016**

- Managed office operations resulting in a well-organized and efficient work environment.
- Coordinated and managed executive calendars, ensuring timely attendance and effective time management for executives.
- Maintained data in various databases and spreadsheets, ensuring accuracy and completeness of information for reporting and analysis purposes.
- Provided high-level administrative support to executive leadership, nurturing client, and vendor relationships.
- Coordinated and supported various projects and initiatives, liaising with cross-functional teams to ensure project milestones were met.
- Maintained electronic and physical filing systems to ensure accuracy and accessibility of information for efficient retrieval and reference.
- Facilitated communication within the organization, disseminating information in a timely and professional manner.
- Demonstrated strong problem-solving skills and sound judgment in handling complex administrative issues, resolving conflicts, making decisions in the best interest of the organization, and escalating issues as needed to ensure timely resolution.

#### **ROTHMAN FOOD GROUP | ASSISTANT GENERAL MANAGER | AUGUST 2011 – AUGUST 2014**

- Acting liaison between the business site and corporate office, responsible for onsite executive decisions, ensuring business needs and goals were met.
- Evaluated inventory on hand and newly received items to ensure the highest quality product and freshness, while maintaining cost effective efforts to meet profit margins, operational standards, and overall business continuity.
- Processed and approved daily invoices, monitoring business accounts of payables and receivables.
- Executed daily accounting reports, verifying cash deposits and withdrawals for cash on hand accuracy and accountability.
- Oversaw monthly inventory process, identifying and evaluating variance reports to accurately narrate month over month changes and trends.
- Performed weekly sales reconciliations with all third-party vendors to ensure accuracy of weekly payment processing.
- Implemented and adhered to staff health and safety standards compliance training program.
- Created a cross-training program ensuring FOH staff members were able to perform confidently and effectively in all positions.
- Nurtured the company culture within the members of our staff and built excellent rapport with new and returning guests to maintain service standards and client retention.
- Grew customer based and increased restaurant social media accounts through interactive promotions, engaging postings, and contests.