

TERRENCE WHITFIELD

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Senior customer service representative with 11 years in financial services and SaaS support. Trusted with escalations, complaint cases, and onboarding for new hires. Comfortable presenting QA trends to managers and rewriting scripts that miss the mark.

Professional Experience

Senior Customer Service Representative, Escalations | Foothill Credit Union | Charlotte, NC
August 2021 – Present

- Own the executive complaint queue, closing 18-25 escalations per week within the credit union's 5-day commitment to members
- Recovered \$312,000 in at-risk member deposits in 2023 by personally working retention calls on closed-account threats
- Lead a weekly QA calibration with 3 supervisors, aligning scoring on tone, disclosures, and Reg E language
- Rewrote the wire-transfer phone script after a CFPB-related finding; member complaints on wires fell by about 40% the next quarter
- Coach a rotating group of 8-10 new reps through their 90-day ramp, including side-by-side call shadowing

Customer Service Representative II | PineRock Software | Charlotte, NC
November 2017 – January 2020

- Handled tier-1 and tier-2 support for a B2B SaaS product used by 4,500+ small businesses
- Closed 60-75 tickets per day across Zendesk and live chat with a 92% CSAT
- Built and maintained a 110-article internal knowledge base, cutting average handle time about 90 seconds per call
- Acted as point of contact for 6 mid-market accounts during their first year on the platform
- Trained the offshore weekend team on product updates through recorded Loom walkthroughs

Customer Service Representative | Allegheny Auto Insurance | Charlotte, NC
March 2014 – August 2017

- Answered 80-100 calls a day on policy changes, billing, and first-notice-of-loss intake
- Hit 100% of monthly quality targets in 27 of 30 measured months
- Promoted from new-hire pod to the retention team after 14 months
- Coordinated with adjusters on 200+ claims handoffs and kept policyholders informed during open claims

Education

Bachelor of Science, Business Communication | University of North Carolina at Charlotte
February 2014

Sandia Health Plan | ICM Contact Center Supervisor Certification
February 2021 – May 2022

Series 6 (lapsed)
March 2018

Key Skills

- Escalation and complaint handling
- Regulation E and CFPB complaint workflows
- Zendesk and Intercom
- New-hire coaching and ramp plans
- Reporting in Excel and Tableau
- QA calibration and scorecard design
- Salesforce Service Cloud
- Knowledge base authoring
- Call script writing