

JASON ISLE
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PROFESSIONAL SKILLS

- Accountability: Owning my successes and mistakes, and learning from others' to provide best results
- Attention to detail: Repeatedly assigned to represent demanding clients due to my knowledge and focus on quality
- Big Picture Thinking: Anticipating a relationship's needs (before they emerge) from every interaction
- Quick Study: Productivity maintained during change as a subject matter expert in stressful transitions
- Surgical Problem Solving: Finding root causes to understand and repair issues when time is crucial

EXPERIENCE

DST Systems (formerly Boston Financial Data Services)

Lead Mutual Fund Representative – Tier 2 & 3 (Flagship) Clients, 2008 – present

- Created procedures for Quality Control and B2B contact before leadership recognized the need
- Team Lead on fund conversions, client-wide projects, and 2014 KnowledgeBase rollout
- Coordinated and led group and individual just-in-time training of new and existing associates
- Maintained quality excellence across all clients:
 - o over 99% of work met/exceeded client expectations in Contact and QC areas
 - o performed QC and Contact roles for over 30 funds
 - o 7-time winner of clients' broker/wholesaler service recognition awards
- Created client training materials which helped multiple teams improve performance
- Consistently proactive in developing solutions to new and upcoming challenges

Senior Mutual Fund Rep – Tier 1 & 2 Clients, 2006 - 2007

- Mastered and trained others in multiple internal & external quality & compliance metrics
- Promoted by relationship's Group Manager to training position (including Series 7-type content)
- Leading role in NQR External Quality Improvement Team, driving company-wide change

Mutual Fund Rep – Tier 1 Clients, 2004 - 2006

- Excelled immediately and reliably in customer service metrics
 - o Achieved BFDS' first internal and global NQR performance ratings
- Managed customer and associate training on post-merger changes to an existing client
- Handled all functions in a focused, one-fund work team: processing, adjustments & phones

EDUCATION

Master of Business Administration – Management and Entrepreneurship (2004)

- University of Missouri – Kansas City. Cumulative GPA 3.408
- MBA program developed strategic thinking, project management, and data analysis skills

Bachelor of Arts – Business Administration (2001)

- Ottawa University – Kansas City. Cum Laude (undergraduate GPA 3.571)
- Master's level capstone thesis project included business plan with pro forma financials