

Emilia Stevenson

Finance Customer Care Representative, Intermediate

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STRENGTHS

- ✔️ **First Contact Resolution**
Resolved finance questions through phone and email, then became a go to resource when peers faced unclear transaction details.
- ♥️ **Service Documentation**
Captured complete ticket histories and practical notes. A clear record often helped the next team act without repeating discovery.
- ☰ **Queue Prioritization**
Balanced calls, cases, and projects through changing demand. Careful status reviews kept urgent customer requests moving.
- 📌 **Policy Guidance**
Translated procurement procedures into plain instructions. Customers received clearer next steps, with fewer incomplete submissions.
- ➦ **Continuous Improvement**
Reviewed recurring questions and refined categories. Small workflow changes gave teammates more consistent ways to respond.

SKILLS

Finance Customer Care
Accounts Payable
Accounts Receivable
Travel and Expense Procurement
Supplier Maintenance
Ticket Management
First Contact Resolution
Phone and Email Support
Data Entry Business Software
Policy Guidance

SUMMARY

Finance customer care professional with three years of experience resolving high volume administrative and transaction inquiries for internal customers and suppliers. Work across Accounts Payable, Accounts Receivable, **Travel and Expense**, Procurement, supplier maintenance, PeoplePay concepts, ticket management, and business software. Provide accurate **first contact support** through phone and email, research transaction histories, document complete case records, and close or escalate requests with sound judgment. Balance inbound contacts, queue priorities, assigned projects, and service expectations in office and remote settings. Explain procurement policies in clear language, protect **confidential financial information**, and coordinate with finance specialists when issues require additional review. Continuous improvement work includes ticket categorization, knowledge documentation, and **recurring issue analysis**. This background supports dependable service, careful data entry, and timely resolution in a busy administrative environment.

EXPERIENCE

Finance Customer Care Representative

Lakeshore Business Services 📅 October 2024 - Present 📍 Grand Rapids, Michigan

Supports internal teams and suppliers through high volume finance service operations. Handles phone and email contacts, transaction research, ticket ownership, policy guidance, data entry, and escalation. Coordinates with finance partners while balancing queue work, inbound calls, and improvement projects.

- Resolved finance inquiries through phone and email, closing tickets or routing complex requests accurately.
- Researched **Accounts Payable** and **Accounts Receivable** histories, providing first contact guidance from transaction records.
- Reviewed **Travel and Expense** requests in business software, correcting missing details before specialist review.
- Explained **Procurement policies** clearly, helping requesters choose appropriate processes and submit complete information.
- Maintained precise ticket notes and **data entry**, giving downstream teams complete case context for action.
- Prioritized inbound calls, queued cases, and **assigned projects** while meeting service expectations consistently.
- Refined ticket categories and reference notes after recurring issue analysis, improving team handling consistency.

Customer Service Representative

Great Lakes Member Services 📅 October 2023 - September 2024 📍 Grand Rapids, Michigan

Managed continuous customer contacts involving account questions, payment records, billing adjustments, and service requests. Used business software to investigate histories, record updates, protect confidential information, and coordinate follow up. Balanced calls, cases, and deadlines across office and remote shifts.

- Managed inbound **phone** and **email** contacts involving payment records, billing adjustments, and account questions.
- Researched customer histories in business software, creating complete records for follow up and audit review.
- Reviewed payment and receivable information, separating routine corrections from cases needing finance review.
- Protected **confidential financial information** through secure workspace and system access practices across remote shifts.
- Balanced active calls with open cases and due dates, completing requests within expected service windows.

Confidential Information

Queue Prioritization

Transaction Research

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



● Finance Customer Care Representative at Lakeshore Business Services (2 Years)

● Customer Service Representative at Great Lakes Member Services (11 Months)

- Flagged repeated questions for team review, contributing clearer language for payment process explanations.
- Documented account updates through accurate **data entry**, reducing repeated customer discovery during follow up.

PROJECTS

Finance Inquiry Knowledge Library 📅 2026

Small documentation gaps can create large service delays. Organized recurring finance questions, policy references, and response guidance into a practical knowledge library that supports consistent ticket handling and clearer customer education.

Ticket Category Improvement Review 📅 2025

A useful category turns a busy queue into a clearer decision path. Reviewed recurring inquiry themes, refined ticket labels, and supported faster prioritization across finance service requests.

LEADERSHIP & AWARDS

- Recognized by service peers for dependable documentation and clear finance process guidance.
- Selected for recurring issue review work that improved reference notes and ticket categorization.
- Trusted with confidential financial information during office and remote customer service operations.

EDUCATION

High School Diploma

Union High School 🎓 GPA: 4.0 📅 2023 📍 Grand Rapids, Michigan

Coursework: Business software, computer applications, communication, financial literacy

CERTIFICATIONS

- Microsoft Office Specialist: Excel Associate 📅 2024
- Customer Service Fundamentals Certificate 📅 2023

TECHNICAL SKILLS

- **Finance Operations:** Accounts Payable, Accounts Receivable, Travel and Expense
- **Procurement Systems:** Procurement, Supplier Maintenance, PeoplePay
- **Customer Service Channels:** Phone support, Email support, First contact resolution
- **Ticket Management:** Ticket opening, Case documentation, Ticket closure
- **Business Software:** Microsoft Excel, Business software solutions, Transaction histories
- **Data Management:** Data entry, Record updates, Information validation
- **Service Operations:** Queue prioritization, Inbound calls, Assigned projects
- **Finance Research:** Transaction research, Payment records, Billing adjustments
- **Policy Support:** Procurement policy guidance, Process explanations, Customer education
- **Information Security:** Confidential information handling, Secure workspace, System access practices
- **Workflow Improvement:** Ticket categorization, Knowledge documentation, Recurring issue analysis

PROFESSIONAL AFFILIATIONS

- Finance customer care professional focused on accurate service, clear policy guidance, and complete case records.
- Administrative service contributor who supports finance partners through organized queues, careful research, and timely escalation.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST