
Ricardo G. Lerma

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Client Success Manager

Client Relationship Management • Business Development • Customer Support • Solution Strategy

Results-driven Client Success Manager with expertise developing account-based strategies and driving sustainable growth through customer support, service delivery, and business development initiatives. Possess the business acumen necessary to elicit customer needs and deliver solutions to meet the challenges of clients across diverse industries. Demonstrated experience developing and delivering training programs for both customers and strategic partners. Strong record of successfully engaging key decision makers, turning around at-risk relationships, and delivering customer-facing product support services.

Areas of Expertise

- Client Support Services
- Operations Management
- Key Account Management
- Policy Development
- Portfolio Management
- Sales Team Enablement
- Process Improvement
- Training & Development
- Creative Problem Solving

Professional Experience

JP Morgan Chase Bank | Austin, TX

2018-Present

Bank Officer/Business Specialist/Relationship Banker

Manage relationships with high net-worth clients and business owners. Drive new business development while fostering the organic growth of existing accounts, consistently leading the regional and national organization in sales performance.

- Assess client needs and present an array of services and solutions for personal banking, small business banking, and investment management.
- Coordinate with internal teams to pursue referral-based business and led seminars for new account relationships.

Comerica Bank | Austin, TX

2014-2018

Personal Banker

Managed a portfolio of 100+ client accounts and serve as the primary contact for all client inquiries regarding transactions, account status, servicing, and operational issues. Worked closely with customers, financial institutions, and internal teams to enable growth in the Texas market.

- Provided leadership to the sales and service team and conducted training on policies, procedures, systems, and products.
- Teamed up with multiple partners to offer specialized lending for industry-specific clients and provide post-sales support of services.

The Manifest Collaborative | Austin, TX

2011-2014

Co-Creator/Producer

Co-Founder and Managing Partner of Creative Business Development Agency & Production Company responsible for business and brand design, management improvement, and implementation for the Artists, Corporate Professionals, and Small Business Owners.

- Responsible for creation of design and production of media campaigns for various corporate and non-profit organizations.
- Successfully built blended brand of strategy and media management for both artists and professionals to increase awareness and workflow through the use of all resources from Corporate to Music to Film/Photography and beyond.

Licenses and Certifications

Series 6 and Series 63- Securities License

Texas Insurance License