

# SANTOSH POUDYAL

## Santosh Poudyal

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## PROFESSIONAL OVERVIEW

**Competent, diligent and results** oriented person with ten years of sales and customer service experience in financial services sector. Exceptional work ethic, meticulous approach to problem solving, strong organisational abilities and key stakeholder management. Able to handle large workloads and successfully prioritise tasks in order to meet deadlines and targets. I have business and finance qualification complemented with experience in the relevant industries.

## PROFESSIONAL SKILLS

- ◇ Effective Customer Relationship Management
- ◇ Dedication to continuous professional development
- ◇ Proactive personality, demonstrating high levels of effort to achieve tasks
- ◇ Result oriented and driven to success
- ◇ Effective stakeholder management with strong cultural orientation
- ◇ Efficient team management skill
- ◇ Fluent in English, Hindi and Nepali

## KEY ACHIEVEMENTS

- ◇ Established new branch from scratch and turned it into profitability
- ◇ Created a new sales channel resulting in additional revenue of a million dollars a year
- ◇ Identified and established a new revenue stream resulting in 20% profit growth
- ◇ Created a strong pipeline for auto, home loans and other financial products
- ◇ Consistently exceeded sales targets by 35%
- ◇ Won The Best Customer Service Award Two years in a row (Nov 2009, 2010)

## EMPLOYMENT HISTORY

### Account Support

WBB Chartered Accounting Ltd, Takapuna  
([www.wbb.co.nz](http://www.wbb.co.nz))

2014– till date

### RESPONSIBILITIES

- ◇ Handling end-to-end account processes for a portfolio of clients (portfolio size 5).
- ◇ Review the system I am involved in and make recommendation to make the systems better, faster and economical
- ◇ To assist in acquiring and retaining clients for WBB by providing support to the accounting team
- ◇ Maintain effective communication between clients and WBB management
- ◇ Assist senior accountants in data entry for tax purposes, tax file setup

### Tasks performed

- ◇ Account receivable and payable management
- ◇ Bank and credit card reconciliation
- ◇ Processing employees' reimbursements sheet and payroll management
- ◇ Processing Job costing and Accrual Entries Cash flow statement preparation
- ◇ Multi-currency management

- ◇ GST, PAYE, Provisional taxes
- ◇ Financial reports preparation
- ◇ Liaise with key stakeholders like Tax Office, Superannuation Companies, Insurance Agencies and other suppliers on behalf of client to keep the book up to date

#### **KEY ACHIEVEMENTS**

- ◇ **Account Receivable:** Played key role in collecting total of \$438K account receivable in age group 60-90 and 90+ days for one of the clients
- ◇ **Upselling services** - Analysed business processes of the clients and recommended appropriate accounting services to meet their needs
- ◇ **GST compliance** – Provided training to the clients to ensure proper GST compliance at their end
- ◇ **Efficient service** – Analysed the existing account processes and systems of the clients and made recommendations to improve processes and system. Automating systems. Result: **reduce processing time by 30%**
- ◇ **Saved costs-** Recommended proper treatment of GST for the transactions and helped **clients save \$585 per month.** Diligently handled employee termination on one occasion and saved \$3500 for a client
- ◇ **Effective reporting:** Improved monthly reporting of accounting information to the management and helped management become better informed

### **Customer Service Executive /Account Support**

**SK Business Services, Sydney, Australia**

**2012 – 2014**

#### **RESPONSIBILITIES**

- ◇ Scoping customers' needs and requirements from existing documents and records
- ◇ Handling all inbound customer enquiries
- ◇ Proactive customer management
- ◇ Problem resolution
- ◇ Profiling customers and recommending appropriate financial products
- ◇ Due diligence procedures to verify and create ABN for customers and suppliers
- ◇ Liaise with ATO and ASIC on behalf of the customer to resolve queries and problems
- ◇ Liaise with customers' insurance companies to manage policies
- ◇ Liaise with customers' superannuation companies to manage their employee's superannuation accounts
- ◇ Reconcile bookkeeping records for customers
- ◇ Customers' record management through ATO portal

#### **KEY ACHIEVEMENT**

- ◇ Reduced customer attrition rate by 25%
- ◇ Created a lead referral system to increase portfolio of customers

### **Branch Manager**

**TATA Capital Ltd. –Mumbai Retail Branch, India**

**2008 – 2011**

#### **Projects:**

- Work with Collection team to reduce existing account receivables in 60-90 days and 90+ days to 5%
- Establish a retail branch and turn it into profitability

#### **Product Handled:**

- |                 |                 |                      |                 |
|-----------------|-----------------|----------------------|-----------------|
| - Auto Loan     | - Home Loan     | - Credit Card        | - Personal Loan |
| - Business Loan | - Managed Funds | - Financial Planning | - Insurance     |

**Team size: 9**

#### RESPONSIBILITIES

- ◇ Business plan for the identification of new business opportunities by analysing market parameters
- ◇ Identify and create cross selling/ referral opportunity by providing excellent customer service
- ◇ Relationship management with customers and brokers
- ◇ Meeting monthly targets for loans and investment products
- ◇ Adopt appropriate strategies to increase sales volume and customer satisfaction
- ◇ Analyse and process loan applications; prepare Credit Memo and present the memo to credit team for approval
- ◇ Adopt appropriate customer retention strategies
- ◇ Customer problem resolution
- ◇ Weekly and monthly reporting to Regional Manager
- ◇ Collaboratively work other business divisions for effective sales and customer management
- ◇ Ensure that branch is running as per standards and guide lines set up by company and by central bank of India
- ◇ Establishing synergy with branch operation team to achieve collective goals and objectives
- ◇ Collaborate with Collection Department, Credit and Legal departments to perform day to day activities

#### **Asst. Sales Manager / Software Developer**

**2004 - 2008**

**Midas Technologies (P) Ltd., Kathmandu, Nepal**

#### RESPONSIBILITIES

- ◇ Visit potential customers; deliver presentations based on their requirements; introduce pricing policy and software development process of the company
- ◇ Understand the changing market pattern and user requirements, update about these changes to project managers to implement them to standard softwares developed by the company
- ◇ Act as a single point of contact between customers and software developers
- ◇ Attend customer meetings; understand their requirements, business structure and process to develop a software
- ◇ Resolve complex pre sales queries of customer
- ◇ Post sales service – ongoing training and support; debugging; queries resolution and software modification
- ◇ Assist customers in migrating to new system via training and data entry

#### Key Achievement

- ◇ Chosen and promoted to an Asst. Sales Manager from a software developer
- ◇ Key contribution in the development of major software packages for the company

### EDUCATION

#### **Certificate IV in Bookkeeping**

**OTEN, NSW, 2012**

#### **Diploma of Financial Planning**

**Kaplan Professional Education, Sydney, 2012**

#### **Master Of Business Administration**

**(Marketing & Finance)**

**Faculty of Management Studies, University of Delhi, 2008**

## REFEREES

*Referees available on request*