

□ **Sonali Shaikh**

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□ **Address:** Omkar Brahma, S wing, Flat 101, Adai, Panvel - 410206

□ *A self motivated dynamic professional with more than 5.5 years of experience in Customer Relationship Management, Service Excellence Management, Home Loan CPA Operation executive **Presently working with Edelweiss housing finance.** Proficient in managing & analyzing customer complaints resulting in enhanced customer experience and process improvements.*

□ *Aspired to pursue career opportunities in **Banking** with an organization of repute.*

□ **STRENGTHS**

□ ***Hard and Smart working, confidence, dedication and honesty towards the assigned work.***

□ ***Adaptable to challenges & changes & Discipline, Team Work, and Time Punctuality***

□ **PROFILE SUMMARY**

□ **Fintrac Pvt Ltd (Paypenny) As a Customer Service Executive REMOTE (Date 5 Dec 2022 to till Date)**

□ Handling the customer query of Canada/Europe/U.K

□ Incoming calls in daily basis around 40 to

□ Providing resolutions of customer query / complaint pertains to all products.

□ Responsible for Cross Selling & enhancing relationship with existing customers

□ Managing inbound and outbound calls in a timely manner.

□ Assisting customers in onboarding them on to our mobile applications.

□ Motivating customers in increasing our mobile application usage.

□ Providing information to our customers on newly added features on our applications.

□ Building sustainable relationships and engaging with customers with a view to build rapport with them.

□ Record keeping duties to be performed on regular basis.

□ Answering general customer inquiries through calls, chat, emails until inquiry is closed.

□ Managing customer accounts including assisting customers with information regarding their order history, order status, and all other standard requests received.

□ Maintaining customer service log, tracking all incoming inquiries and detailing out customer requests, product defects, etc.

- ☐ Handling customer complaints, provide appropriate solutions and alternatives within the time limits; follow up to ensure resolution.

☐ **Edelweiss Housing Finance Ltd – Panvel, Navi Mumbai (3rd June 2019 to 30th October 2019)**

- ☐
 - Manage all loan and credit requests and made recommendation for approval.
 - Maintain a database of all borrowers in accordance with bank standards.
 - Established and maintained portfolios of all current lenders.
 - Ensured that all credit and loan standards were applied.
- ☐
 - Met with customers requesting loans or lines of credit to start determination process
 - periodically reviewed lender portfolios to identify possible risks.
 - Worked with colleagues on more involved loan and credit transactions.

☐ **Indiabulls Housing Finance Ltd – Vashi, Navi Mumbai (13th June 2016 to 30th December 2016)**

- ☐
 - Manage all loan and credit requests and made recommendation for approval.
 - Maintain a database of all borrowers in accordance with bank standards.
 - Established and maintained portfolios of all current lenders.
 - Ensured that all credit and loan standards were applied.
- ☐
 - Met with customers requesting loans or lines of credit to start determination process
 - periodically reviewed lender portfolios to identify possible risks.
 - Worked with colleagues on more involved loan and credit transactions.

☐ **12 months of experience in ICICI Bank Ltd, Navi Mumbai, as a CPA Manager. (21st May 2015 to 18th May 2016)**

- ☐ Daily MIS and reports preparation for sharing with Top Management.
- ☐ Dashboard, T48, Monthly Tracker, First Builder Disbursement data, profile wise data preparation.
- ☐ Making of Disbursement Memo for processing of Home Loan Docket.
- ☐ Preparation of Revalidation sheets, Cancellation Memo, Re-Booking DMs.
- ☐ Updation of details of property in APS (Application Processing System) and Finnone.
- ☐ Updation of details of technical valuation in PAS and Finnone.
- ☐ Creation of Request Ids and forwarding the same to technical team for tech visits.
- ☐ Generation of property & Seller dedupes.
- ☐ Checking of Home Loan documents and forwarding the same to BCM for Authorisation.
- ☐ Popsheet maker of dockets for easy tracking by Ops Team.
- ☐ Cheque collecting from Ops team and handing over to concern BSM.
- ☐ Dockets and Files sent to Ops and Rejection MIS.
- ☐ High Value MIS preparation for Dockets.
- ☐ Daily Workcell display board updation.
- ☐ Branch wise MIS for login count.
- ☐ Carrying Non-Discrepancy check of docket for further process & cheque cut.
- ☐ Calculation of HL, LAP, Top up, BT cases.
- ☐ Recredit and Revalidation and Approval forwarding.
- ☐ Co-ordination with Data entry operators and KYC Check of Loan Documents.

☐ **IDBI Intech LTD with experience of 1.9 Years (27-May-13 to 16-Feb-15) as Customer Services Associate**

- ☐ Providing resolutions of customer query / complaint pertains to all products.
- ☐ Responsible for Cross Selling & enhancing relationship with existing customers.
- ☐ Selling of Investment products like Mutual Fund, Insurance & Current A/c, Savings A/c.
- ☐ Enhancing the value of existing customers of Current A/cs & Saving A/cs and retaining of the same.
- ☐ Maintaining the MIS in excel file for tagging and lead monitoring on daily basis.
- ☐ Data entry for the leads handled of externally and internally.
- ☐ Cost Management and staff productivity data preparation.
- ☐ Customer acquisition & cross selling of ATM data, Web form data and phone banking data.
- ☐ Publishing team MIS on weekly basis.
- ☐ Tracking of end to end process of leads process in the financial year.

☐ **HDFC Bank LTD with experience of 10 months (14-Jun-12 to 08-Mar-13) as Sales Co-ordinator Cani Team**

- ☐ Providing resolutions for the queries of walk-in customer regarding SB and CA.
- ☐ Responsible for Cross Selling & enhancing relationship with existing customers.
- ☐ Selling of Investment products like Mutual Fund, Insurance & Current A/c, Saving A/c.
- ☐ Tracking and closing the calls for the A/cs with default customers.
- ☐ Responsible for the branch servicing operations.
- ☐ Customer acquisition & cross selling to walk-in customers.
- ☐ Publishing team MIS on weekly basis for targets.
- ☐ Completing the forms of Current A/c, and sending the same for log in.
- ☐ Updation of CRM Ids on daily basis.

☐ **S.S. SOLASE AND COMPANY with experience of 1 Year (01-Jun-11 to 31-May-12 as Accountant**

- ☐ Preparing of Books of Accounts.
- ☐ Preparing of Bank reconciliation and financial statements.
- ☐ Co-ordinate with internal and external agents for the purpose of audits.
- ☐ Preparing of MIS/reports like Profit & Loss statement, monthly closing and cost accounting reports.
- ☐ Compiling and analyzing financial information to prepare entries to accounts, such as general ledger accounts, and document business transactions

- ☐ Proficiently work on Tally.
- ☐ Invoicing and Receivable management

☐ **CORE COMPETENCIES**

- ☐ APS
- ☐ LAM
- ☐ CPCS
- ☐ FINNONE
- ☐ I-DISBURSE
- ☐ OMNIDOCs

☐ **CERTIFICATION COURSES**

- ☐ MS CIT Course
- ☐ Tally 9.0 ERP

☐ **SCHOLASTIC**

- ☐ **B.Com** from Mumbai University, Mumbai 2011.
- ☐ **H.S.C** from Mumbai University, Mumbai 2008.
- ☐ **S.S.C** from Mumbai University, Mumbai 2006.

☐ **IT SKILLS**

- ☐ MS Word, MS Excel, MS PowerPoint.

☐ **PERSONAL SNIPPETS**

- ☐ Date of Birth : 31st December 1989
- ☐ Languages Known : English, Hindi and Marathi.

☐ **Declaration**

- ☐ I hereby declared that the information given is true to the best of my knowledge. Thanking you.
- ☐ Date:
- ☐ Place:

Yours faithfully,
Sonali Shaikh.