

HIMANI RAJPUT

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JOB TITLE/CAREER

With a degree in finance under my belt and certifications in customer service and financial management, I have the technical and people skills needed to be a banking client representative. I am also skilled in CRM software, and communication. I have worked in the banking industry for over five years, focusing on financial consulting, account management, and client interactions. I am the ideal candidate for this position because of my remarkable problem-solving skills, meticulous attention to detail, and dedication to providing excellent client experiences.

CORE SKILLS & TRANSFERRABLE COMPETENCIES

Customer Service | Financial Management | CRM Software | Communication Problem-solving | Account Management | Attention to Detail

ACCOMPLISHMENT

- effectively oversaw a portfolio of more than 200 client accounts, boosting retention rates by 15% in the first year by providing individualized care and prompt communication.
- implemented a new CRM system that sped up customer communications, resulting in 20% faster response times and 25% higher customer satisfaction scores.
- led a cross-functional team in the creation and execution of a financial literacy program. This improved client engagement and resulted in 10% more new account openings in just six months.

Work Experience

Authorized sales agent | Royal Legacy Marketing, Richmond Canada (05/2024- 07/2024)

- Deal with clients, answer their queries, sell Roger's products, and handle customer portfolios
- Hot calling and direct interaction with customers
- Give training to new hires

DEPUTY MANAGER | HDFC Bank, India

09/2022 –02/2024

- I provided excellent service to over 100 clients every day by responding to inquiries, resolving issues, and providing tailored financial solutions.
- employed state-of-the-art CRM software to track client contacts and expedite follow-up processes, resulting in a significant improvement in response times and customer satisfaction.
- I worked as a teller for 6 months and after that I shifted to the welcome desk where I pitch third-party products to the customers.
- Handling customer grievances and queries related to some product or service.

RELATIONSHIP MANAGEMENT EXECUTIVE | Federal Bank Financial Services, India

02/2021 – 09/2022

- Respond to consumer complaints and questions.
- Keep the company's relationship with its clientele positive.
- Current understanding of the company's new product and ability to inform customers.

- Manage branch activities, including loan processing, managing cash, entering all transactions, and creating bank reconciliation statements.

CUSTOMER SERVICE EXECUTIVE | Muthoot Fincorp Ltd, India

09/2018 – 02/2021

- Maintained branch daily operations and data entries.
- Maintained bank reconciliation statements and other utilities and expenses in charge.
- Sold third-party products to the customer like Health insurance and home insurance.

EDUCATION & PROFESSIONAL DEVELOPMENT (list all education, training and certification they have obtained)

MASTER OF BUSINESS ADMINISTRATION - FINANCE | University Canada West, Vancouver

(2024 – currently)

BACHELOR OF COMMERCE - FINANCE and Management | Hemwati Nandan Bahuguna Garhwal University, India

2015 - 2018

TECHNOLOGIES

- Office 365, Word, Excel, PowerPoint, Tally ERP9, CRM