

RUDRI JOSHI

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SKILLS SUMMARY

- Analytical approach
- Lending experience and knowledge of credit products
- SQL Programming
- Details Oriented
- Problem Solving

EXPERIENCE

HSBC

Broker Care Specialist | October 2022 – January 2023

- Answers calls and queries from brokers and clients and act as a liaison between HSBC and broker until the mortgage application is funded.
- Offers value added service based on individual customer needs, including keeping clients up-to-date on progress, informed of changes and delivering on expectations.
- Act as a primary point of contact for more complex operational inquiries from the Broker Data Entry Team.
- An advocate of HSBC values and business principles by putting the client first and delivering excellent customer service to complex client needs by keeping up to date on training and internal communications.
- Addresses client concerns and complaints and escalates as appropriate. Meet individual performance targets and service level agreement (SLA) expectations.

Canadian Imperial Bank of Commerce (CIBC)

NSL Mortgage Support Specialist | April 2021 - October 2022

- Interacting with branch employees and Mortgage Advisor inquiring or requesting changes to client's current mortgage and line of credit. Listening and identifying the representative needs to ensure complete understanding of the customer's requirements.
- Additionally educating and helping the clients over the phone with payout requests and escalating rush funding requests for the mortgage or Home Power Plan application.
- Responding to inquiries / needs in a timely manner, deciding upon the most appropriate solution available from a variety of options, taking into consideration the situational factors and existing procedures and policies.
- Successfully applying knowledge of CIBC's new products, procedures and systems during the interactions by multitasking in a fast-paced environment with tools such as horizon, mMortgage, Excalibur and much more.
- Consistently met and exceeded department expectations for productivity and accuracy levels. Greeted with multiple recognitions from quality monitoring and leader listening.

Canadian Imperial Bank of Commerce (CIBC)

Financial Services Representative - Dual Outbound | February 2019 - April 2021

- Proactively contacting clients to review the financial priorities and providing accurate need-based solutions.

- Prequalify clients for loans, lines of credit, and mortgages by pulling the credit bureau and determining the eligibility after risk assessment of the client to proceed with the application.
- Solving client problems and taking ownership for the technical problems by actively listening and asking right questions.
- Recipient of multiple recognitions personal achievements; including Top NPS, Top QEF, Top Productivity and Amazing Moments.
- Assist clients in using various channels for accessing their banking such as mobile banking, telephone banking and also helping to resolve technical issues.

TRANSITION TO DUAL FSR:

- Take inbound calls for clients calling with questions, requests, or concerns for their banking needs.
- Offer superior client experience on every call to meet high first-call resolution rates and exceed client expectations by collaborating with branch and other internal department if needed.

PROJECTS:

- Selected by the Team Leader to work on a Pilot Project named E-Client where the clients were proactively reached out to complete the incomplete applications for the products on CIBC Website.
- Worked on a Pilot Project called Compass Campaign – piloting software used in Branch by implementing the same in Telephone Banking Procedures.
- Floor Support/Progress Leader – Actively supported new hires in training and provided appropriate coaching when identified opportunities of growth

ZEDD Customer Solutions Inc. (Toronto, ON)

Telecommunications Sales Representative | November 2017 - January 2019

- Credit card activations and providing suggestions about the various products based on the cardholders' needs (Cross- selling).
- Accurately input, retrieve, and access information regarding a customer directly from our clients' database.

EDUCATION AND CERTIFICATION

Computer System Technician Networking | May 2016 - September 2017

- Post-Secondary graduate college diploma from Canadore College.

Cisco Certified Network Associate Routing and Switching (CCNA) | May 2018

Google Data Analytics Certificate | March 2023

COMPUTER & SYSTEMS PROFICIENCY

- CIBC Systems: Certapay, Chordiant, COINS, ECIF, Horizon, Smart, Telagent, Verint, Wealth Management Tool, WDE, 3270 COINS, Compass, Support Hub, mMortgage, Aurora, LCMS, Excalibur, Target Imaging.
- MS Office (Word, Excel, PowerPoint, Outlook), SQL Programming, Google drive, Docs, R programming language, HTML.