

Mayank Patel

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ABOUT ME

A dynamic MBA finance professional with a decade long corporate journey, specializing in trade finance, client implementation, operations, payments, accounts payable and receivable. Holds a project management certification and specializes in system enhancements within treasury and trade solution domain for APAC, Western Europe and Middle east regions.

Recognized for expertise in process and product improvement with hand on experience in client implementation, accounts reconciliation, UAT and PVT pilot testing, Host to Host connectivity and Documents negotiation. A collaborative team player with strong interpersonal skills and multicultural understanding.

WORK EXPERIENCE

Implementation Manager

JP Morgan Chase Bank N.A [Jul 2022 – Current]

Country: India

- Managing Client Implementation as a single consultative point of contact throughout the implementation cycle. Facilitate the initiation, planning, execution and evaluation, coordinating all communication and associated documentation between internal teams (Legal, Client Services, Operations, Technology, Sales and Coverage, etc.) and the Client.
- Responsible for planning (including resource allocation), organizing, controlling and reporting all the project activities and communicating regularly on the progress and issues. Handled highly experienced client-centric team throughout the overall implementation process, ensuring all team members meet established timeframes and deliverables to ensure a successful implementation including technology aspects of the integration.
- As a implementations manager responsible for owning, driving, and coordinating all aspects pertaining to the onboarding and setup of Corporate Bank products and services for corporate clients. Identifying enhancement areas for improvement both internally and externally to the overall productivity of the team.
- Leading discussions with the clients, onshore or regional sales and implementation, other business stakeholders, subject matter experts and product managers to drive collaboration, resolve conflicts and build consensus. Focus on end to end ownership by Identifying, execute and lead innovative solutions with the client centric mindset.
- Maintained controls agenda to ensure policies and procedures are followed to serve the client and protect the integrity of the bank. Provide support to team members as required. Identifying and driving process improvement and efficiency initiatives to enhance client and internal team or stakeholder experience.

Assistant Manager

Citi Bank N.A [Aug 2015 – Jul 2022]

Country: India

- Overseen the international trade finance operation, SWIFT payments, Accounts payable and receivable in Treasury and Trade Solution department for multiple regions.
- Assisted to implement necessary process improvements that will increase the efficiency and quality of the team's work and outputs. Successful timely processing and controlling of trade finance transactions within time frames set. Liaison between Trade Finance front offices and Client On-boarding Teams to ensure complete information and documentation. Performed accounts reconciliation and record various journal entries.

Securities sales agent

Kotak Mahindra Bank Pvt Ltd. [May 2014 – Aug 2015]

Country: India

- Managed Demate and trading account opening process and representing the bank in local community.
- Negotiate brokerage rate of trading with clients. Sharing Analysis of equity and market movements for future investment strategies. Managed Client database, Improve process efficiency, Coordinate with team members for preparing Charts and report on periodically.

EDUCATION AND TRAINING

MBA in Finance and Banking

University of Mumbai [Mar 2010 – Jun 2013]

Country: India

Bachelor Degree in Accounting and Finance

University of Mumbai [May 2009 – Jun 2010]

Country: India

Higher Secondary Degree

University of Mumbai [Apr 2006 – Apr 2007]

Country: India

COMMUNICATION AND INTERPERSONAL SKILLS

Proficiency Chronology

- Excellent written and verbal communication skills, internally as well as externally.
- Ability to handle multiple projects concurrently, all in varying degrees of the implementation life cycle.
- Project Management experience. Knowledge of ERP systems, Host to Host technologies, and various client access / digital channels.
- Strong presentation and problem-solving skills. International trade finance operation, Process automation and Digital Banking. Strong analytical, interpersonal, leadership and business partnering skills. Special projects and management reporting skills.

HONOURS AND AWARDS

Project Management

Harvard Manage Mentor [1 Jan 2024]

- Project management involves planning, executing, and closing projects to achieve specific goals. It includes defining objectives, creating schedules, allocating resources, managing risks, and ensuring the project's successful completion within scope, time, and budget constraints.
- Effective communication, team coordination, and adaptability are key skills for project managers to navigate challenges and deliver successful outcomes.

Platinum award 2018

Citibank N.A [Aug 2018]

- I awarded with Citi Platinum award 2018 for Successfully migrated and processed UAE project of supply chain finance, Process automation, exceptional handling for Huge volumes of Transactions.
- Accomplished 70% of manual process to STP Automation which help to avoid manual touch point, errors, reduced time taking activity and Increased efficiency.

HOBBIES AND INTERESTS

Interest in Cooking, Analyzing small documentary video case study.