

# SURENDRA YADAV

Business Operations & Data Analyst — Python — SQL — Power BI — Supply Chain — MIS

Nautanwa, Uttar Pradesh, India

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## PROFESSIONAL SUMMARY

Data-driven Business Operations Analyst with 3+ years of financial services experience and expertise in Accounting, Supply Chain Management, MIS, and Advanced Analytics. Proven ability to leverage Python, SQL, Power BI, and AI tools to streamline operations, optimize inventory management, automate reporting, and deliver actionable business insights. Skilled in bridging finance, supply chain, and data analytics to drive operational efficiency, reduce costs, and support strategic decision-making across FinTech and logistics domains.

## TECHNICAL SKILLS

**Programming & Analytics:** Python (Pandas, NumPy, Automation, AI-assisted Workflows), SQL (Queries, Joins, Subqueries, Reporting)

**Data Visualization:** Power BI (Interactive Dashboards, DAX), Advanced Excel (Pivot Tables, VLOOKUP/XLOOKUP, Power Query, Dashboards)

**AI & Productivity Tools:** ChatGPT, Gemini (Data Cleaning, Analysis, Documentation, Process Automation)

**Supply Chain & Warehouse:** Inventory Control, Stock Management, Warehouse Operations, Logistics, Inward/Outward Processes

**Financial Software:** Tally Prime, Accounting Systems, Payroll Management, MIS Reporting

**Core Competencies:** Financial Reporting, MIS, Business Intelligence, Process Automation, Statutory Compliance, Operations Management

## PROFESSIONAL EXPERIENCE

### Relationship Manager

December 2023 – October 2024

*Prayas Financial Services Private Limited, Gorakhpur*

- Drove customer acquisition pipeline achieving 100% monthly loan disbursement targets through data-driven lead segmentation and risk analysis using Excel and SQL-based reporting systems
- Designed and maintained comprehensive MIS reports tracking KPIs including disbursement velocity, collection efficiency, portfolio quality, and customer retention metrics, enabling data-backed strategic decisions
- Implemented automated data entry protocols reducing processing errors by 35% and ensuring 100% regulatory compliance through systematic CRM database management
- Optimized loan collection workflows by developing Excel dashboards analyzing payment patterns, delinquency trends, and risk indicators, improving recovery rates by 20%

### Kendra Manager

January 2022 – December 2023

*CreditAccess Grameen Limited, Kaptanganj*

- Managed end-to-end branch operations for 500+ customer accounts, utilizing advanced analytics to optimize loan portfolio mix and identify cross-selling opportunities, increasing branch revenue by 25%
- Built automated MIS reporting system using Python and Excel integrating disbursement, collection, and inventory data, reducing manual reporting time by 50% while improving accuracy
- Streamlined customer onboarding and documentation processes through process mapping and system optimization, reducing turnaround time by 30% and enhancing customer satisfaction scores
- Conducted predictive analytics on loan performance data identifying early warning signals for defaults, contributing to maintaining 95%+ collection efficiency and minimal NPA levels
- Trained and mentored 5-member team on data management best practices, SQL basics, and system operations, ensuring consistent data quality across all operational processes

### Insurance Assistant

2021 – 2022

*Alive GIC, Nautanwa*

- Managed insurance policy database and documentation workflow, implementing systematic tracking mechanisms that improved policy renewal rates by 15%
- Performed customer data analysis identifying cross-sell opportunities and customer segmentation patterns, supporting sales team with actionable insights that increased premium collection

## KEY PROJECTS & TECHNICAL ACHIEVEMENTS

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- **Supply Chain & Inventory Analytics Dashboard:** Developed integrated Power BI dashboard connecting accounting, inventory, and logistics data to track stock levels, warehouse movements, inward/outward flows, and billing cycles. Implemented automated alerts for low-stock situations and discrepancy detection, reducing inventory holding costs by 18%
- **AI-Powered Loan Portfolio Analysis System:** Built SQL and Python-based predictive model analyzing 1000+ loan accounts to forecast default probability. Leveraged AI tools (ChatGPT) for data cleaning and feature engineering. System identifies high-risk accounts 30 days in advance, reducing NPA by 15%
- **Automated Payroll & Compliance System:** Created end-to-end payroll automation using Python, Excel VBA, and Tally Prime integration processing salary calculations, statutory deductions (PF, ESI, TDS), and compliance reporting. Reduced monthly payroll cycle from 3 days to 4 hours with zero errors
- **Warehouse Operations MIS:** Designed comprehensive MIS framework for warehouse operations tracking inventory turnover, storage utilization, dispatch efficiency, and documentation compliance using Excel Power Query and SQL databases

## EDUCATION & CERTIFICATIONS

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### Bachelor's Degree in Arts

2020 – 2023

Siddharth University, Siddharth Nagar, Uttar Pradesh

### Professional Certifications:

Warehouse Management in Logistics & Supply Chain Management

Tally Prime – Accounting & Finance (CIT Nautanwa, Feb 2023 – Oct 2023)

CCC – Course on Computer Concepts (NIELIT, November 2021)