

## **SAMEERA ROHIDAS BOBADE**

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## **PROFESSIONAL EXPERIENCE**

### **Star Union dai-chi Life Insurance Company Limited**

#### **Operation Executive (Oct 2021 - Present)**

- Handled customers queries, inquiries, complaints via phone calls, emails responding to inquiries, resolved problems with enthusiasm.
- Utilize problem solving skills to resolve customer issues and enhancing service levels.
- Accurately tracked and recorded customer interactions in CRM platform.
- Resolved concerns with products or services to help with retention and drive sales.
- Helped large volume of customers every day with positive attitude and focus on customer satisfaction.
- Responded to customer needs through competent customer service and prompt problem-solving.
- Increasing overall performance, productivity, and profitability and responsible for building sustainable customer relationships with the successful delivery of customer service and monitoring/measuring customer satisfaction.
- Achieved high satisfaction rating through proactive one-call resolutions of customer issues.
- Negotiated with regular vendors to achieve optimal saving in pricing for routine operational expenses.
- Introduced new methods, practices and systems to reduce turnaround time.
- Evaluated suppliers to maintain cost controls and improve operations.
- Established audit and internal control procedures and recommended process improvements to address issues.
- Performed auditing work in accordance with rigorous auditing standards and principles.

### **SEARCH (Society for Education, Action and Research in Community Health)**

#### **Accountant (Jan 2020 to Sep 2021)**

- Detected and corrected mistakes early on and implemented systems to avoid recurring issues.
- Completed daily cash functions and operational activities like account tracking, payroll and wage allocations, budgeting, donating and cash and banking reconciliations, stock approvals, bill approvals of payments.

- Partnered with auditors to track errors, add contributions to maintain accuracy.
- Improved data collection, financial analysis to optimize practices and retain customers.
- Handled day-to-day accounting processes like records of payments & receipts of cash & bank to drive financial accuracy.
- Documented cash, credit, fixed assets, accrued expenses and line of credit transactions - payment of professional tax & provident fund, handling cash counter for payments, receipts, donations etc.
- Handling budget & expenditure of all departments, record maintenance of filing & vouchers for audit purpose.
- Handling bank correspondence like employee's salary accounts, organization's bank accounts & different modes of payments.
- Managing different investments of organization like fixed deposits, Mutual funds, bonds & handling TDS reconciliation, Bank reconciliation.

### **PMC Bank**

**Officer (Feb 2017 to Jan 2020)**

- Met with customers to generate new business and negotiate contracts.
- Assisted customers with issues or requests and mentored employees on customerservice techniques.
- Assisted with daily cash and ATM balancing, expertise of handling heavy cashcrowding of customers at counter.
- Conducted cash and key audits for controls and compliance.
- Developed and implemented strategies for HNI Customers.
- Recommended new Plans and products to boost consistency and customerexperiences.
- Maintained friendly and professional customer interactions.
- Established rapport with new clients to increase satisfaction and loyalty.
- Work experience of generating new loan leads & converting the same into loanproposals.
- Experience of marketing & selling of other supporting bank products like mutualfunds, credit card, insurance products, new bank schemes.
- Opening & handling different types of accounts, making & issuance of draft, pay orders, debit & credit cards, cheque book, passbook, FD receipts, financial transfers, CTS Clearing.

### **Meera Enterprises**

**Administrative officer (Jan 2011 to Jan 2017)**

- Responded to customer inquiries via phone, email and web-based platforms in orderto direct customers to appropriate departments for additional support.
- Answered multi-line phone system, routing calls, delivering messages to staff andgreeting visitors.
- Set priorities and problem-solved workflow issues to maintain rapport with customersand managers.

- Helped large volume of customers every day with positive attitude and focus on customer satisfaction.
- Participated in continuous improvement by generating suggestions, engaging in problem-solving activities to support teamwork.
- Worked with customers to understand needs and provide excellent service.
- Handled bank correspondence like employee's salary accounts, preparation of cheques & entry into accounting systems, invoice, billing & payments, company's bank accounts & different modes of payments & all other Correspondence with banks.
- Experience of managing payment of professional tax & provident fund, tracking payments made in advance and outstanding payments, checking and making of company's online payment, reviewing and updating of expense details.
- Supported monthly reporting activities using Microsoft Excel in order to analysis & achieve validation of internal reports.
- Handling daily cash functions like account tracking, payroll and wage allocations, budgeting, and all types of cash and banking reconciliations.
- Handled reviews of updating of data entry in Tally, monitored client accounts, analysed incomings and outgoings, and performed daily, weekly, and annual forecasts.
- Managed files and records for clients and adhered to safety procedures to prevent breaches and data misuse.
- Working experience of inventory management, attendance management, vendor management, office management.
- Record maintenance of file vouchers, bank statements & any other general filing of finance dept for audit purposes.
- Handling of issuing invoices & quotation, purchase orders, sales order, interaction with vendors regarding orders.
- Monitored all company inventory to ensure stock levels and databases were updated.
- Working experience of collecting and preparing the roles and responsibilities of the employees and updating the management and make necessary amendments as and when required.
- Used coordination and planning skills with team members in order to achieve target results

### **EDUCATION**

- **M.com** 2017, Pune University
- **B.com** 2010, Pune University

### **SOFT SKILLS**

Cost analysis and savings, Profitability and revenue building, Documentation and reporting, Customer Service Excellence, Customer Complaint Resolution, Product Knowledge, Billing Inquiries, Customer Accounts Management, Quality assurance, Inbound Customer Service, Customer Relationship Management, CRM, Recordkeeping strengths, Money handling abilities, Report preparation.

### **ADDITIONAL SKILLS**

- Microsoft Office package: Microsoft Word, Excel, Power point
- Oracle, Finacle SAP, Tally 9.0 ERP, MS-CIT, ICWAI: Certificate in computer Hands on training.