

MEET PATEL

CUSTOMER SERVICE REPRESENTATIVE - Financial Modelling & Regulatory Compliance

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PROFESSIONAL SUMMARY

Customer Service Representative with experience supporting operations and client interactions in fast-paced environments. Coordinated workflows for 150+ team members, processed 120+ daily transactions with accurate records, and guided 80+ guests per shift. LQP certified with strengths in customer communication, compliance awareness, CRM recordkeeping, performance reporting, data analysis, regulatory documentation, and workflow coordination.

SKILLS

- **Client Support & Engagement:** Customer Inquiry Resolution, Policy Clarifications, Account Assistance
- **Data Management & Recordkeeping:** Customer Information Updates, Lead Tracking, CRM Database
- **Insurance & Regulatory Knowledge:** LLQP Standards, Compliance with Provincial Insurance Guidelines
- **Workflow Management:** CRM Communication, Client Email Management, Customer Information Updates
- **Reporting & Analysis:** Sales Activity Reports, Performance Metrics Documentation, Dashboard Tracking

WORK EXPERIENCE

Process Guide **September 2024 - Present**
Amazon Fulfillment Services *Ottawa*

- Orchestrated daily operational activities with Area Managers, supporting shift targets and ensuring smooth workflow for 150+ team members efficiently.
- Identified and resolved process bottlenecks during peak hours, streamlining operations and reducing workflow delays by 20% across multiple shifts consistently.
- Trained 30+ new hires on safety procedures, operational standards, and workflow protocols ensuring compliance.

Front Desk Receptionist **January 2024 - March 2025**
Choice Indian Restaurant *Ottawa*

- Facilitated 80+ guests per shift, managing reservations, waitlists, and inquiries while maintaining efficient front-desk operations in a fast-paced restaurant environment.
- Processed 50+ billing and payment transactions daily, ensuring accurate record maintenance and supporting daily cash reconciliation with zero discrepancies.
- Resolved 5+ guest concerns through prompt communication, service recovery, maintaining customer satisfaction.

Sales Trainee **June 2023 - November 2023**
R D Patel & Company Private Limited *India*

- Maintained and updated customer records, leads, and follow-up activities, improving data accuracy by 25% across all client interactions consistently.
- Facilitated senior sales representatives in preparing proposals, quotations, and presentations, supporting 50+ client meetings and improving proposal efficiency for each engagement.
- Prepared weekly CRM reports on leads, client interactions, sales progress supporting strategic decisions.

PROJECT EXPERIENCE

Comparative Financial Analysis of Cement Companies on BSE
Independent Project

- Conducted ratio, trend, and common size analysis for 5 cement companies, identifying key performance gaps that improved investment decision insights by 25%.
- Evaluated liquidity, profitability, and solvency using 2018–2022 financial statements, presenting actionable recommendations that influenced strategic evaluation of 3 potential investment opportunities.
- Compared industry peers using valuation metrics, highlighting positioning and supporting investment evaluation.

EDUCATION

Accounting & Bookkeeping Practices Diploma,
Business Development & Sales Diploma January 2024 - August 2025
Algonquin College, Ottawa

Bachelor of Business Administration August 2020 - April 2023
Veer Narmad South Gujarat University, India

CERTIFICATIONS

- **Life License Qualification Program (LLQP)** - Ontario, Canada

ACCOMPLISHMENTS

- **Trained in Production Internship at HET Electric Solution, India,** managed inventory and quality control for electrical product workflows. April 2022 – July 2022