

Alisha Singh

Financial Service Representative – CRM Platform, Credit Analysis & Conflict Resolution

✉ singh.alisha0203@gmail.com

☎ (+1) 647-928-1442

📍 [Toronto](#)

in [LinkedIn](#)

SKILLS

- **Loan Processing Tools:** Salesforce CRM, Flinks, and Underwriting for loan verification, process management.
- **Credit Report Analysis:** Equifax and TransUnion interpretation, identifying risk indicators and assessing credit.
- **ERP & CRM Systems:** Engage, Host, InfoSwiss, and Salesforce for client account management and operations.
- **Microsoft Excel:** VLOOKUP, PivotTables, Macros, filtering, data sorting, and formula-based financial data modeling.
- **Financial Analysis:** Evaluating income statements, credit scores, and risk metrics to support underwriting decisions.

WORK EXPERIENCE

Financial Service Representative

July 2023 – Present

Progressa

Ontario

- Verified 250+ credit profiles monthly via Equifax, TransUnion, Flinks, and Decision Logic; calculated DTI, reviewed income stability, and assessed employment data to approve 80% of applicants within structured credit policy guidelines.
- Managed 120+ full-cycle loan files using Salesforce CRM monthly; explained terms, scheduled amortizations, ensured agreement execution, reducing overall processing time by 22% and boosting workflow transparency across departments.
- Analyzed 400+ credit files, applied default forecasting models, and generated risk memos for underwriting teams, aligning 95% of loan approvals with institutional thresholds for probability of default and capital adequacy standards.
- Collaborated across underwriting, compliance, and audit teams, resolved 60+ discrepancies monthly via Host and InfoSwiss, ensuring SLA adherence and achieving 100% readiness across all lending deliverables and reporting cycles.
- Audited 100+ financial records weekly, verified identity proof, loan agreements, and policy clauses, flagged discrepancies, and updated records in Salesforce CRM, reducing processing errors by 18% and contributing to regulatory compliance.

Sales Associate (Assistant Manager)

June 2022 – July 2023

Glentel

Ontario

- Delivered 80+ tech consultations, leveraged CRM data to tailor recommendations based on usage behavior and feature priorities, increasing satisfaction ratings by 20% and achieving optimal alignment with individualized preferences.
- Surpassed Q4 sales by selling 82 devices in November, applying market demand metrics and demographic segmentation to identify bundling strategies, boosting conversion rates and maintaining ranking in monthly store performance.
- Trained 10+ new staff in CRM usage, POS operations, and inventory cycle counts, standardizing onboarding deliverables and reducing ramp-up time by 35%, while ensuring system alignment with benchmarks across retail environments.
- Directed 15-member team, coordinated promotional launches, and executed briefings that improved campaign cohesion, increased upselling consistency, and contributed to a 25% uplift in unit throughput over the promotion period.
- Conducted sales analysis on history and product affinity, identified upsell windows, and restructured bundling pitches accordingly, increasing accessory and service attachment rates by 30% across four consecutive monthly sales cycles.

Client Financial Services Associate

January 2019 – August 2021

EXL / Zurich Insurance

Uttar Pradesh

- Processed 80+ insurance transactions daily, including policy settlements and cancellations, via InfoSwiss ERP platforms, maintaining 99% data integrity and ensuring compliance with Zurich standards across transactional workflows.
- Investigated recurring discrepancies by performing variance analysis, modifying financial postings, and updating SOP documentation, reducing average issue resolution time by 28% across three major insurance product categories.
- Managed accounts receivable lifecycle through ledger reconciliation, overdue invoice monitoring, and automated alert systems, achieving a 98% recovery rate and reducing escalation frequency by optimizing internal prioritization.
- Delivered training to 15+ employees on German-language query handling, multilingual documentation protocols, and data accuracy, which improved consistency, increased client resolution speed, and reduced onboarding lag by 23%.
- Designed automation using macros, pivot tables, and VLOOKUP formulas, streamlining recurring report generation and reducing report preparation time by 30% while boosting accuracy and cross-team visibility of output metrics.

EDUCATION

Graduate Certificate in Strategic Management – Accounting

September 2022 – April 2023

Centennial College, Canada

Graduate Certificate in Financial Technology

September 2021 – April 2022

Seneca College, Canada

Bachelor of Business Administration

August 2016 – April 2019

Institute of Management Studies, India

CERTIFICATIONS

- **German Language Certification – B2 Level**