

Vaibhav Agarwal

EXPERIENCE

September 2021 - Current

Senior Associate Fidelity International Limited | Gurgaon

- Check the journey initiated by client for SIPP (Self Invested Personal Pension) movement.
- Provide functional expertise and ongoing support to operations.
- Provide the feedback to other pension providers by setting up meeting with their escalation POC's.
- Working with Compliance and baking reconciliation team after the money or units are received for the client.
- Working with AML (Anti Money Laundering) team to check that client is AML verified or not. If not, then asking the calling team to contact client or Advisor and ask for documents.
- Improving the process based on analytical data insights that we have.
- I have also worked in a different role in Fidelity i.e for Anti Money Laundering (AML) team.
- Got the Premium clients AML verified at a fast pace, so that they do not face any issue while moving their assests to Fidelity's platform.
- Also, Helped the Business analyst to improve the AML verification process by going through the old critical cases that we faced in past.
- Acting as a bridge between the Clients/ Advisors and the internal AML team .
- Analyzing the NPS (Net Promoter Score) satisfaction survey that client/ advisors provide us after their issue regarding AML is resolved and then providing the updates to the team about the improvements that we can bring in the process that would benefit both the client and company.
- Also worked with Complaints team and did analysis on the complaints raised by clients or IFA and then provided them a quick resolution by connecting with different internal teams .

June 2019 - August 2021

Senior Customer Care Professional (Backend Operations)
American Express (India) Pvt. Ltd. | Gurgaon

- Provide functional expertise and ongoing support to operations.
- Handling Credit Balance refund requests with integrity.
- Highlighting issues through feedback and recommending the changes in the existing workflows, procedures – that are based on customer demands so that we can meet their requirements and also ensuring that quality service is given at all.
- Also to balance customer interests with the interests of American Express.
- Improving the process based on analytical data insights that we have.
- I have also worked in a different role in American Express i.e; for Disputes Analysis Department.
- Managed the dollar disputes for the high value card members (majorly Platinum card owners)
- Helped the Business analyst to improve the Disputes tool by providing him by and team's point of view.
- Acting as a bridge between the US card member's who have raised

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SUMMARY

I want to pursue a challenging career in a progressive environment where learning, innovative and creativity are encouraged, where my skills & knowledge can be enhanced to their maximum potential to contribute to overall success and growth of the organization.

SKILLS

- Advance Excel
- Financial analysis
- Transaction management
- Problem analysis
- AML (Anti Money Laundering)
- UK Pension analysis

DECLARATION

I, Vaibhav Agarwal, hereby declare that above mentioned facts are true to the best of my knowledge and belief.

dispute and the Disputes analysis team.

- Analyzing the Card member's satisfaction surveys after their disputes is resolved and then providing the updates to the team about the improvements that we can bring in the process that would benefit both the card member and company.

March 2018 - May 2019

Associate Analyst (Data Analytics - Content Engineering) Global Logic Technologies Pvt. Ltd. | Gurgaon

- Working on a Verify Entity project where analyzing and cleaning the large raw data
- Drawing conclusions & developing recommendations with the Quality Analyst team
- Advising on the Sustainability guidelines and suggesting Improvements
- Co-ordinating between the Manager and team for evaluating new requirements
- Acting as bridge between Developer, Tester and Client
- Creating stories with acceptance criteria for the Project team.

January 2017 - February 2018

Associate Software Engineer Contyxt Internet Technologies Private Limited | Gurgaon

- Worked on a role of: Associate Business Analyst
- Prepared detailed overview of the Product
- Preparing the deliverable items with Phase Planning and timelines
- Helping Testing team to prepare test scenarios
- Acting as bridge between Developer, Tester and Client.

EDUCATION

2016

B.Tech | Computer Science Engineering

Manav Rachna International University, Faridabad, HR

2012

XIIth Class

Sherwood Convent School, Gurgaon, HR

2009

Xth Class

DAV Public School, Gurgaon, HR