

# TANIYA

CUSTOMER EXPERIENCE ASSOCIATE: Portfolio Growth, KYC/AML Compliance, Client Retention

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## SKILLS

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- **Financial Compliance:** IFIC Certification for Mutual Fund Sales Authorization and regulatory adherence.
- **Client Mobility:** Ontario Class G License facilitating territory-wide travel for onsite banking consultations.
- **CRM Architecture:** Salesforce and Customer 360 proficiency to drive data centric client engagement cycles.
- **Portfolio Analytics:** Quantitative assessment of asset growth using Excel for high net worth reporting data.
- **Channel Migration:** Digital banking adoption through institutional fintech integration and client education.

## WORK EXPERIENCE

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### Customer Service Associate

December 2025 – Present

*McDonald's*

*Ontario*

- Accelerated digital channel penetration by 20% through technical guidance on mobile ordering applications and kiosk platforms to reduce queue latency periods.
- Reduced complaint recurrence by 30% by performing root-cause analysis on service escalations and coordinating cross-functional corrective operational actions.
- Onboarded 10+ personnel on POS systems and safety compliance protocols, reducing total training time by 25% while maintaining zero cash-handling discrepancies.
- Optimized order fulfillment workflows by partnering with kitchen and shift management to ensure adherence to 100% of service standard performance benchmarks.
- Executed high-volume transaction processing and inventory reconciliation audits during peak service windows to ensure 100% accuracy in financial reporting data.

### Business Advisor (Deputy Manager-II)

July 2022 – October 2025

*ICICI Bank Ltd.*

*India*

- Directed 70+ payment gateway integrations for institutional clients by translating complex technical requirements into functional software deployment workflows.
- Optimized cybersecurity efficiency by 30% through implementation of transaction monitoring protocols and rigorous risk-based AML/KYC authentication procedures.
- Scaled portfolio growth 10x by executing data-driven retention strategies and competitive repositioning for high value relationships with clients at risk of account attrition.
- Sustained 100% resolution rate within 20-minute service windows by diagnosing technical failures and coordinating with back-end engineering and ERP systems.
- Developed Excel-based portfolio dashboards to analyze asset distribution and prioritize relationship management efforts based on quantitative growth metrics.

## PROJECT EXPERIENCE

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### Digital Channel Migration & Micro Market Analysis

*ICICI Bank Intern, Haryana*

- Directed primary research across 4 institutional segments to map banking behavior and transaction drivers, identifying top 3 preferred banks within each city.
- Benchmarked ICICI Bank positioning against market-leading competitors across 4 dimensions to identify switching risks and develop mitigation recommendations.
- Executed digital adoption campaigns for resistant client segments, explaining encryption and two-factor protocols to accelerate channel migration by 25%.
- Delivered structured market intelligence reports to senior stakeholders, utilizing socioeconomic data to optimize branch strategy and local market penetration.

## EDUCATION

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Master of Business Administration (Finance & Business Analytics)

2020 – May 2022

*Kurukshetra University, India*

Bachelor of Science (Biotechnology)

2016 – May 2019

*Kurukshetra University, India*

## CERTIFICATIONS

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- Investment Funds in Canada (IFIC) - CSI Canada-Completed 2026
- Class G Driver's License - Ontario