

ROOPA GOYAL

PERSONAL BANKING ASSOCIATE: Financial Operations, Portfolio Management, Regulatory Compliance

✉ roopagoyal02@gmail.com

☎ +1 (437)-249-0068

📍 [Brampton, Ontario](#)

in [LinkedIn](#)

SKILLS

- **Financial Operations:** Executing account openings and processing transactions with high-volume accuracy.
- **Portfolio Management:** CRM software to manage client relationships and deliver advisory support.
- **Regulatory Compliance:** Maintaining financial accuracy and audit standards during cash handling cycles.
- **Revenue Generation:** Implementing up-selling techniques and market trend analysis to expand asset growth.
- **Technical Literacy:** Advanced proficiency in Microsoft Excel for data entry and internal report generation.

WORK EXPERIENCE

Customer Service Cashier

January 2023 – August 2025

Gladiator Burger and Steak

Ontario

- Processed high-volume POS financial transactions with 100% accuracy, ensuring proper cash balancing, reconciliation, and adherence to operational and audit procedures.
- Assessed customer needs through active interaction to recommend suitable products, improving satisfaction while maintaining confidentiality and handling sensitive data.
- Maintained inventory tracking systems to ensure 100% availability of essential supplies, supporting uninterrupted service delivery and operational efficiency standards.
- Managed front-end operations during peak hours, ensuring on-time service execution, while maintaining systemized workflows and consistent customer experience quality.
- Improved payment processing efficiency by 15% through digital workflow optimization and resolving POS issues to ensure minimal disruption in transaction handling.
- Trained 5 staff on cash handling, compliance procedures, and safety standards to ensure adherence to regulatory requirements and consistent operational practices.
- Coordinated with kitchen and service teams to streamline order handling, reducing delays and improving service flow while maintaining quality and accuracy.
- Performed daily cash reconciliation and record validation to detect discrepancies and maintain financial integrity in compliance with internal control procedures.
- Guided customers on digital payment options and mobile usage, increasing adoption by 20% while supporting organizational goals for digital transaction growth.

Business Development Manager

June 2017 – July 2020

Gillson Technologies

India

- Led 15-member teams to deliver client-focused solutions, ensuring alignment with service expectations while maintaining structured workflows and performance standards.
- Secured 25+ institutional contracts by identifying client needs and presenting tailored solutions aligned with operational capabilities and long-term business value.
- Increased client engagement by 35% through structured relationship management and consistent follow-ups, supporting retention and cross-selling opportunities.
- Improved project execution efficiency by 20% by coordinating across teams, resolving bottlenecks, and ensuring timely delivery aligned with service commitments.
- Analyzed market data to identify growth opportunities and recommend service enhancements according to customer needs and organizational revenue objectives.
- Conducted risk evaluations on partnerships to ensure compliance with financial and regulatory standards while protecting business and client interests.
- Mentored 10 associates on client interaction, negotiation, and service delivery, improving team productivity and consistency in meeting performance targets.
- Developed Excel dashboards to track performance metrics, supporting decision-making and ensuring transparency in reporting to senior stakeholders.
- Strengthened coordination between technical and sales teams, improving client retention by 18% through better communication and service alignment.

EDUCATION

Diploma in International Business Management

2022

Niagara College, Ontario

Master of Business Administration

May 2015 – June 2017

Lovely Professional University, India

Bachelor of Technology (Hons) in Electronics and Communication

Lovely Professional University, India