Archa Arora

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Professional Summary

Client-focused Financial Services and Operations Professional with 3+ years of experience supporting financial services, insurance, customer service, and corporate environments. Skilled in high-volume client communication, outbound calling, appointment scheduling, documentation management, workflow coordination, and relationship support. Experienced with CRM platforms, KPI/SLA-driven environments, confidential records, and structured case management. Proven ability to manage competing priorities, maintain accuracy, resolve client inquiries, and deliver professional, high-quality service while building strong and lasting client relationships.

Skills

• Client Service and Financial Relationship Support
• Case Management and Escalation Resolution
• SLA Compliance and Service Performance
• Appointment Scheduling & Advisor Support
• Compliance, Confidentiality, and Risk Awareness
• CRM Systems and Digital Platforms (Salesforce, Genesys Cloud, Compass, Answer Hub)
• Microsoft Office (Excel, Outlook, SharePoint) and AI Tools (Copilot)
• Data Management, Reporting, and Documentation Accuracy
• Workflow Optimization and Operational Efficiency
• Cross-Functional Communication and Stakeholder Coordination
• Customer Inquiry Management and Service Recovery

Work Experience

Teleperformance | Waterloo, ON
Case Management Specialist II | 04/2026 - Present

- Managed 50–60 inbound and outbound customer interactions daily, identifying customer needs, addressing concerns, and providing solutions to support customer retention and satisfaction.
- Conducted outbound customer calls and follow-ups, addressing inquiries, handling objections, and applying structured communication and problem-solving techniques to strengthen customer relationships.
- Utilized Answer Hub, Compass, Genesys Cloud, and Copilot to document customer interactions, track cases, and maintain accurate follow-up activities.
- Maintained detailed and compliant customer records while achieving 95%+ SLA compliance, following documentation standards and service procedures.
- Collaborated with internal teams to resolve complex customer concerns efficiently, supporting retention efforts and improving the overall customer experience.

IG Wealth Management | Waterloo, ON
Administrative Coordinator / Receptionist | 12/2025 - 03/2026

- Managed 50–60 daily client interactions via phone, email, and CRM systems, ensuring timely and professional resolution of inquiries with strong attention to detail.
- Coordinated schedules, appointments, and follow-ups for 10+ financial advisors, improving responsiveness and client service delivery across daily operations.
- Maintained 100+ client records weekly using CRM systems, Excel, and SharePoint while ensuring confidentiality, accuracy and compliance standards consistently.
- Supported clients through documentation requirements, account-related inquiries, and service request lifecycle activities, including customer onboarding support, ensuring accurate processing and timely professional service delivery in a high-volume environment.
- Streamlined administrative workflows, reducing documentation errors and improving overall operational efficiency and process consistency.