

# DHARMIK PATEL

PERSONAL BANKER – Digital Banking Tools, Financial Data Analysis & HR Information Systems

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## SKILLS

- **Microsoft 365:** Advanced use of Office productivity tools, Outlook for data processing and reporting.
- **CRM Platforms:** Data-driven systems for managing clients, automating workflows, tracking service analytics.
- **POS & Cash Handling:** Operation of retail point-of-sale systems with precision in billing, reconciliation, audits.
- **Verification Systems:** Automated frameworks for validating, auditing, and authenticating digital records.
- **Enterprise Tools:** Outlook, Teams, SAP SuccessFactors for workflow coordination and HR data integration.

## WORK EXPERIENCE

### Baker and Crew Member

*Tim Hortons*

November 2023 – Present

*Ontario*

- Executed over 200 financial transactions daily with full compliance to operational standards, ensuring transactional accuracy, maintaining audit-ready records & optimizing front-end data handling workflows across registers.
- Facilitated 150–200 customers per shift using POS systems & digital verification tools, resolving service inquiries promptly, enhancing response accuracy & ensuring structured workflow alignment with internal service protocols.
- Applied regulatory hygiene & confidentiality standards across all operational processes, maintaining 100% adherence rate through continuous quality verification & compliance auditing for data & product handling procedures.
- Increased workflow efficiency by 15% through process optimization, integrating automated reporting systems and procedural checklists to ensure task prioritization, load distribution, and continuous performance monitoring.
- Implemented service quality audits and data validation procedures to benchmark team performance, aligning all service outcomes with key operational indicators and supporting 90%+ customer satisfaction across shifts.

### Supervisor

*Bar Burrito*

May 2024 – February 2025

*Ontario*

- Directed operational workflows for 5–7 staff in a high-traffic environment, delegating tasks via structured coordination systems, ensuring quality assurance & maintaining 100% compliance with service-level requirements.
- Resolved 95% customer escalations directly by utilizing technical issue-tracking frameworks & response logs, ensuring high-resolution accuracy, maintaining consistent alignment with defined operational performance metrics.
- Developed structured training documentation & process outlines for 10+ new hires, implementing procedural modules reduced onboarding timelines by 30%, improving operational knowledge retention across departments.
- Streamlined in-store process flow by deploying digital task boards and scheduling modules, which optimized labor utilization, reduced peak-hour wait times by 25% and ensured balanced service distribution in shifts.
- Executed cross-departmental workflow monitoring via digital dashboards, analyzing performance trends, minimizing operational bottlenecks, and improving overall throughout efficiency across all service segments.

### Process Associate

*Viaan Solutions*

March 2022 – September 2022

*India*

- Processed and validated 200+ client financial records weekly, ensuring 98% data accuracy and compliance with internal controls, directly supporting efficient operations and handling of confidential customer information.
- Collaborated with cross-functional teams to reconcile discrepancies in client payment and account data, streamlining transaction accuracy and reducing processing delays by 15% while maintaining service quality standards.
- Monitored documentation accuracy and maintained audit ready financial files using CRM and Excel tools, contributing to improved operational transparency and risk management aligned with banking regulatory protocols.
- Delivered customer service through timely communication and engaging problem resolution, ensuring 100% adherence to SLA timelines while strengthening client relationships, client retention and satisfaction metrics.
- Processed account management and reporting functions by tracking transactional data, preparing performance summaries, and identifying opportunities to optimize service efficiency by 25% and effective banking products.

## EDUCATION

### Post-Graduate Certification in Human Resources Management

*Conestoga College, Doon Campus, Ontario*

September 2024 – April 2025

### Post-Graduate Certification in Financial Technologies

*Conestoga College, Doon Campus, Ontario*

September 2023 – April 2024

## CERTIFICATIONS

- **Investment Funds in Canada (IFIC) — In Progress**