

MITRA BANAI

Experienced and self-motivated Banking/Finance professional & Black Belt certified in lean six sigma with 20 years of industry experience. Bringing forth a proven track record of successfully managing large teams, major projects and operations.

Email - mitra.banai2@gmail.com

Profile - [LinkedIn](#)

PROFILE

A confident Customer Success and Operational excellence senior leader and Lean Six Sigma Black Belt certified practitioner. Enthusiastic about operational efficiency and procedural improvements leveraging Lean Six Sigma DMAIC methodologies to produce consistent Full Time Equivalent (FTE) savings with each project. Extensive experience in Finance, Insurance, B2B sales and Marketing operations. Built and coached strong operational teams of 20-120+ staff in customer success and remediation, including 2 call centres and 8+ departments. Recognised for ability to optimise organisational workflow, and deliver customer success initiatives receiving Shingo accreditation, signifying achievement in the world's highest standard of organisational excellence for the team.

Thrives in leading collaborative teams, using strategic and creative approaches to achieve organisational objectives. Committed to elevating the customer experience through operational excellence.

KEY SKILLS | SPECIALISATIONS

- Sales Business Operations and People Management
- Customer Success
- Finance Operations
- Call Centre Operations
- Process Improvement, re-engineering and remediation
- Operational Workflow
- Work force Management

CAREER HISTORY

Jands Audio & Lighting

Head of Operations

May 2023 - Current

Responsibilities:

Leading the Customer Operations and Technical Systems teams in a B2B business. Driving transformational change across customer journey and leading the digital transformation projects. Design contract management policy to manage risk and infrastructure. Manage contracts and relations with suppliers, vendors, partners and other stakeholder management. Drive productivity initiatives across the business to enhance the customer & supplier journey. Deliver Transformational change projects, provide leadership and support to sales crew on the field and oversee their performance.

Commonwealth Bank of Australia (CBA)

Senior Manager,

Acquisition Customer Experience and Retention, Commlnsure Sept 2020 – Nov 2022

Responsibilities:

Reporting to the Executive, Customer Experience, the role is leading insurance product sales strategy and distribution strategies, performing analysis on regulatory and distribution changes, and managing end-to-end acquisition activity.

Achievements:

- Delivered 3+ distribution and retention strategies, supporting the front-line network, digital contact strategy and marketing. Maximised channel distribution of insurance products for all channels.
- Managed 3 managers, providing guidance on the Retail strategic sales agenda executing projects which enhanced the customer experience and retention with the brand and product offerings.
- Developed and delivered customer insight initiatives which grew the portfolio consistently by obsessing over customer outcomes.
- Collaborated with channels such as Branch, Lending, Digital, marketing to align the insurance distribution strategy with the communication strategy to become #1 in customer satisfaction.

CBA

Senior Manager, RBS Customer Remediation

April 2019- Sept 2020

Responsibilities:

Heading the operations stream, responsibilities involved facilitating remediation management for all qualifying issues, implementing control mitigants, and expanding the operations team at the offshore office in India.

Achievements:

- Built and managed 2 onshore and offshore (India) remediation operations teams, successfully expanding the department from 2 to 35 analysts including 2 team managers, over 12 months.
- Established an automated messaging system to conclude correspondence with customers receiving payment resulting in an improved end-to-end remediation experience for all customers and minimised unnecessary customer calls to branches.
- Consolidated and automated a manual back-office process, by developing and applying 3 MS Excel data collection spreadsheets, thus improving operational efficiency from 14 to 5 handoffs.
- Maximised data analysis output by establishing best practices and tools for conducting quality assurance on large datasets.
- Conducted consistent audit workshops with all upstream and downstream stakeholders to streamline all remediation processes and minimise customer impacts.
- Streamlined workforce management of 3 streams of operations to ensure effective resource allocation.

CBA

Senior Manager, Operational Excellence

Sept 2017- April 2019

Senior Manager, Customer Advocacy and Remediation (seconded) April 2017- Sept 2017

Responsibilities:

Selected to mentor and guide senior leadership across 4 major internal departments to design and apply various operational initiatives with a goal of achieving process excellence and effective production management for each department. Seconded to Senior Manager position advocating for

customer concerns, providing recommendations to improve accessibility, managing general insurance risk and compliance matters, and representing the department in policy reviews.

Achievements:

- Coached 11 Six Sigma Green Belt certified managers, ensuring each member felt supported and empowered to make decisions and problem solve with confidence and competence.
- Facilitated 3 process re-engineering initiatives, resulting in 10+ FTE savings and reducing use of 4 resources for each department.
- Effectively administered the stakeholder management program, involving conducting impact assessments, designing productivity training manuals, and delivering workshops to senior leadership.
- Established a dedicated advocacy team within the department, committed to providing recommendations and strategies to address accessibility concerns and requirements for all insurance product offerings.
- Identified and quantified the impact of potential issues raised by the branches, and effectively supported and managed the development of end-to-end remediation plans that benefited both the customers and branches.

PRIOR ROLES

CBA -Customer Experience Manager, Group Customer Relations

CBA- Manager, Operations & Workflow, Home Loans

CBA- Team Manager, Financial Hardship, Customer Credit, Complaints, Home Loans

PROFESSIONAL DEVELOPMENT

- Lean Six Sigma Green Belt Certified (2017)

QUALIFICATIONS

- Certificate in Operational Excellence (Black Belt)

TRAINING

- Agile Coaching
- Capability Coaching
- Advance Project Management
- Advance Leadership fundamentals

CERTIFICATIONS

- Lean Six Sigma (Black Belt)
- Lean Six Sigma (Green Belt)
- Project Management

REFERENCES

Available on request