

SIYI LI

CLIENT RELATIONSHIPS / BUSINESS DEVELOPMENT / FINANCE

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PROFILE

Bilingual client-facing commercial professional with experience across banking, foreign exchange, lending support and consultative sales in Australia. Experienced in needs discovery, outbound customer engagement, CRM-based follow-up, referral generation and target-driven service. Finance-trained with strong relationship-building, analytical and cross-cultural communication skills, with a long-term interest in Sales, Business Development and Finance.

EXPERIENCE

Personal Banking Assistant / Westpac Bank

Mar 2025 - May 2026

- Managed 100+ customer interactions on busy days, using needs-based conversations to understand priorities and support appropriate financial outcomes.
- Conducted scheduled outbound calls and identified lending and business merchant-service needs, generating qualified referrals to specialist teams.
- Maintained accurate CRM records and collaborated with lending, business banking and operations teams to progress customer requests and follow-up.

Sales Ambassador / JO Traikos Pty Ltd

Sep 2024 - Mar 2025

- Used consultative selling, personalised recommendations, cross-selling and upselling in a target-driven retail environment.
- Contributed to a 10% increase in sales while building rapport quickly and handling customer objections.

Customer Service Coordinator / RedRate Exchange

May 2024 - Mar 2025

- Supported international customers with foreign-exchange and cross-border transaction needs in Mandarin and English.
- Managed customer and transaction records in CRM systems, proactive follow-up and issue resolution in a high-volume environment.

Financial Broker Assistant (Internship) / Raffles Capital Finance Pty Ltd

Aug 2023 - Mar 2024

- Supported 10+ financing cases by gathering client requirements, reviewing financial information and coordinating documentation among clients, brokers and banks.
- Assisted with onboarding and follow-up and contributed to workflow improvements that reduced processing time by approximately 30%.

Barista / Calypso Cafe & Juice Bar (Matraville)

Jun 2023 - Jan 2024

- Built early Australian customer-service experience in a fast-paced environment, strengthening communication, multitasking, teamwork and resilience.

EDUCATION

University of New South Wales

Sep 2022 - Mar 2024

Master of Commerce (Finance)

Macquarie University

Jul 2019 - Jun 2022

Bachelor of Commerce (Accounting)

CAPABILITIES

Client & Commercial Relationship building / Needs discovery / Consultative selling / Referral generation / Cross-selling / Customer engagement

Business & Systems CRM systems / Opportunity tracking / Stakeholder coordination / Process improvement / Microsoft Excel / PowerPoint

Languages Mandarin Chinese - Native / English - Professional Working Proficiency