

First Name Last Name

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Senior Level Assignments

~ Sales and Operations Management ~ Financial Services ~ Customer Relationship Management

PROFESSIONAL PROFILE

Senior Executive offering **11 years** of strong, decisive executive leadership in well-known organizations. An accomplished professional who has successfully diverse facets including Hard Core Sales, Backend Operations, Accounts and Finance, Internal audit (Finance and Quality), Risk Management, Customer Service, Legal and Compliance, Admin and Support, Technology, New Branch Setup, Human Resource Department & MIS. Have substantial experience in managing services to meet operational and business objectives, inclusive of growth and margin targets. Proven record of handling projects requiring smooth & seamless relocation of Business Processes. With significant experience in managing process & ensuring conformity to the preset process/quality parameters, possess skills in conducting various training sessions for enhancing the performance and quality of service. An ambassador of Change with the distinction of successful business process re-structuring, implementation of business solutions in organizations within preset budgets and deadlines. Excellent communication and people management skills that have been honed through managing multi skilled teams.

Core competencies entail:

- **Operations Management:** Conceiving/implementing term plans for achievement of process objectives. Administering operations and leading teams for excelling business targets & service delivery metrics. Exploring potential business avenues & managing operations for achieving increased business growth & initiating development efforts. Defining service standards and guidelines that serve as benchmark for excellent service delivery thereby contributing towards ameliorated service revenue generation. Overseeing a team of managers involved in setting up targets, SOP & SLA, setting and maintaining CTQ (Critical to Quality)/CTP (Critical to Process) targets and planning for the process. Providing high quality Operational Support to improve overall customer satisfaction; managing respective section and ensuring that instructions are processed as per the service levels.
- **Process Management:** Mapping business requirements and coordinating in developing and implementing processes in line with the pre-set guidelines. Analysing the data and providing the information that helps in overall growth of the organisation. Undertaking responsibilities of removing unnecessary procedures in processes; ensuring uniformity in the process understanding at the client's and the organization's end. Monitoring the overall functioning of processes, identifying improvement areas and implementing adequate measures to maximize customer satisfaction level.
- **Team Management:** Recruiting, mentoring & monitoring the performance of team members, assessing quality of work and ensuring efficiency in process operations & meeting of targets. Creating and sustaining a dynamic environment that fosters development opportunities and motivates high performance amongst team members.

CAREER HIGHLIGHTS

XXXXXX – till date **XXXXXXXXXXXXXXXXXX, UK**
Vice President

The Accountabilities:

- ⇒ Determine & formulate strategies and set the overall direction of the organization for Insurance, Mutual Funds and General Insurance within the guidelines set up by the Board of Directors.
- ⇒ Plan, direct, and coordinate operational activities at the highest level of management with the help of subordinate executives and staff managers.
- ⇒ New branch set ups with all infrastructures.
- ⇒ Imparting training to the team on the products and various processes.
- ⇒ Identification, short listing & appointment of right Vendors & Service Delivery Partners.
- ⇒ Ensuring smooth and uninterrupted sales and operations being conducted as per set guide lines.
- ⇒ Develop financial plans based on analysis of clients' financial status and discuss financial options with clients.
- ⇒ Quarterly budgeting: MIS on the sales, expenditure vs. budget on revenue expenditure – cost control.
- ⇒ Interfacing with other support areas such as product controllers, corporate treasury and operations.

May'07 – Mar '08 **XXXXXXXXXXXXXXXXXX, UK**
Associate Vice President

The Accountabilities:

- ⇒ Supervising sales & operations of Life Insurance, General Insurance & Mutual Funds for Karnataka and Goa region.
- ⇒ Spearheading sales and operations of 19 retail branches with a team size of 380 members.
- ⇒ Monitoring the overall functioning of processes, identifying improvement areas and implementing adequate measures to maximize customer satisfaction level.
- ⇒ Reviewing and ensuring transaction acceptance/processing are carried out at desired efficiency level with less than 1% error rate across all branches in the Region.
- ⇒ Supervising customer service operations for rendering and achieving quality services; providing first line customer support by answering queries & resolving issues , ensuring minimum TAT.
- ⇒ Preparing and reviewing MIS reports & other statements with a view to apprise management of the process operations and assist in critical decision-making process.
- ⇒ Strengthen relationship with business partners & ensure proper expansion of business as per agreed plan.

- ⇒ Setting out quality systems for various operational areas, ensuring a high-quality customer experience, while adhering to the work processes and quality standards.
- ⇒ Recruiting, managing & monitoring the performance of team members to ensure efficiency in process operations, Sales and meeting of individual & group targets.
- ⇒ Determining training needs of associates and conducting suitable training programs on technical and soft skills to enhance their operational efficiency leading to increased productivity.

The Attainments:

- ⇒ Led the preparation of training manuals of Mutual Funds application processing, MFI Tracker, MFI Explorer & analyzing portfolio of institutional clients.
- ⇒ Prepared CS Manual using bottom up approach.
- ⇒ Successfully initiated new processes for minimizing rejections of applications/lost of applications.
- ⇒ Initiated compliance over track of FMP rollovers & pending documents register for Institutions.
- ⇒ Received the "Best New Comer Award" for turning around the retail business.

Jul'03 – Apr'07

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Business Development Manager

The Accountabilities:

- ⇒ Responsible for managing a team of 10 Sales Executives & Officers.
- ⇒ Achieving the budgeted target by setting up a strong distribution network.
- ⇒ To create, develop and close new business opportunities.
- ⇒ Achieving the sales targets, forecasting, planning, execution and training etc.

CERTIFICATIONS

- ⇒ Diploma in Business Module

ACADEMIC

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|--|--------------------------|------|
| Bachelors in Business Management. | Staffordshire University | XXXX |
| Honors in International Business | Staffordshire University | XXXX |

EXTRA CURRICULAR ACTIVITIES

Represented as 1) College Events Manager
2) Public Relationship Officer

SOFTWARE USED

MS-OFFICE, MFI Tracker, MF Explorer, ODIN, HTML, Java, Tally, Web Designing.

PERSONAL DETAILS

Date of Birth : XX XX XXXX

Address : XXXXXXXXXXXXXXXXXXXXXXX