**First Name of Application CV No 1648320**

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**Sr. Sales Officer in Banking/Insurance**

**Objective**:

I am an efficient customer focused professional seeking an opportunity where I can use my excellent customer service skills, outstanding communication skills and knowledge of Insurance systems and products to help solve customers’ banking & Insurance issues.

**Education:**

Bachelor in Banking and Insurance

**Work Experience:**

**Royal Sundaram Insurance Co. (3yrs 5m) August 2008 - May 2011**

**Worked as a Junior Sales Officer**

* Collection of the database of the prospective clients related to Health Policy  
  −Cold calling on the data.  
  − Visiting the customers and closing the leads.  
  − Processing the documents.  
  − Solving the queries of the customers.  
  − Reminders to the customers for the due premium amounts.  
  − Maintaining good relations with the clients.
* Answered incoming customer service enquiries and advised customers
* Made outgoing sales calls to encourage existing customers to upgrade
* Ability to maintain the records and review them.
* In-depth knowledge of medical terminology in relation to diagnoses and procedures
* Need to explain detail policy and diseases which cured under Health Policy.
* Collection of proper documents required for the claim processing
* Entering the claims data into system
* Analyzing the claim cases for the detection of fraud claimants
* Processing the claims after proper investigation.
* Understanding the medical history of the clients.
* Reviewing the total premiums paid by the customer.
* Resolved problems resulting from claim settlement

**PMC Co-operative Bank Ltd Nov 2011 - December 2015 (4yrs 1m)**

**Designation - Sr. Sales Representative - Retail Banking**

* Generating sales of Products and Services.
* Developing and sustaining strong and long lasting relationships with the customers
* Presenting the products to the customers
* Identifying and understanding client needs
* Market research for the products, services and competing companies and competing products.
* Ensure process documentation is in order to comply with quality standards
* Managing the HNI customers at bank
* Achieving the business targets assigned in terms of cross selling, enhancing and upgrading the high net worth relationships.
* Profiling customers and provide financial products to meet customer needs.
* Providing the highest levels of service to the HNI worth customers.
* Providing financial planning and investment advise.
* Achieving the sales targets in loans, retail banking, Debit cards, Opening New accounts, Insurance, Lockers facility, Demat facility, etc.
* One point contact for all requirements of High Net Worth Customers in Branch
* Acquisition and Servicing of High Net Worth Customers in the Branch.
* Sales and business developing in different across areas
* Assess customer needs and make appropriate relationship enhancement recommendations through financial needs analysis
* Provide financial planning & Investment Advise to ensure the highest levels of service
* Ensure current and prospective customers have a consistent, superior experience with the bank
* **Additional Skills:**
* MS-office, excel, word, outlook, Pdfs, PowerPoint
* **DOB**: 25/09/1989
* **Status**: Single