

CURRICULUM-VITAE

MUKESH BABU

Contact no- 9899755051, 9990165525

Email: mukesh00967@gmail.com

Retail Business/ Digital Marketing / Agency sales / Sales Customer Service / General Insurance/ Health Insurance/ Fire & Theft insurance/ Group Insurance, Home insurance. Mutual Fund, Investment Planning,etc.

ZFUNDS: December 2022 to Till date .

CLSTER HEAD - B2B MODEL.

In LUCKNOW.

- ☐ **Agency Sales /B2B Model.**
- ☐ Meeting acquisition target month as planned
- ☐ New lead Generation.
- ☐ Cold calling, Sale Training.
- ☐ Research and Development According to the market.
- ☐ Maintain and keep track of all records of sale closure and Follow up.
- ☐ Building new relationship with New Existing Mutual Fund Sub broker of Industry and empanelling them with us so as to generate Business.
- ☐ Working for Mutual Fund and Insurance Business. Insurance of all the types such as Life Insurance, Health and General Insurance.
- ☐ Identifying opportunities of maximum profit with new and old clients
- ☐ Sales of MF, SIP, Corporate FD and bonds.
- ☐ Ensuring the centre to be in Profitability by determining right kind of strategy
- ☐ Sales targets in Health insurance, Life insurance & Motor insurance..
- ☐ Converting people holding client age to new MFSB as NEW ARN so as to utilize them and get new business.

Hare Krishna loan & Insurance Services : August 2021 To November 2022.

AREA BUSINES HEAD -Retail In GI/LI/HEALTH

- ☐ **Agency sales / Retail/ POSP .**
- ☐ Sales throughout business in all UP.
- ☐ Meeting acquisition target month as planned.
- ☐ New lead Generation.
- ☐ Cold calling, Sale Training.
- ☐ Research and Development According to the market.
- ☐ Insurance business all type life insurance, Health insurance & general insurance.
- ☐ Ensuring the centre to be in Profitability by determining right kind of strategy
- ☐ Sales targets of LI/ GI/HOME INSURANCE / Motor insurance.
- ☐ Driving all the sales channels & teams to meet their Hooks and Cross Sell target.
- ☐ Designing effective trade / channel commission policies based on market insights & product positioning.
- ☐ Every week training in all POSP in Lunching new in Policy contest.

SYMBO India Insurance Broking: December 2019 to July 2021
BDM -Retail lending BY POS
In LUCKNOW.

- ☐ **Sales/Customer Services /Training of All POS.**
- ☐ Meeting acquisition target month as planned
- ☐ Ensuring the centre to be in Profitability by determining right kind of strategy
- ☐ Ensuring the Product Activation and less penetration.
- ☐ Ensuring the NPA levels not to increase with the Collection Team
- ☐ Penetration of Sales Through Direct Sales Force
- ☐ Sell targets of LI/ GI/HI...
- ☐ Generation Sales by training of Sales Team of AM and Relationship Officers.
- ☐ Driving all the sales channels & teams to meet their Hooks and Cross Sell targets.
- ☐ Product conceptualization based on market insights, customer need
- ☐ Designing process framework for manual & automatic fulfillment of products and coordinating with circle, Service Delivery & Technical Teams for the same
- ☐ Designing effective trade / channel commission policies based on market insights & product positioning.

Turtle mint
Unit Manager – October 2017 to September 2019

- ☐ Acquiring new client Two-wheeler& four wheeler agent and including commercial vehicles.
- ☐ Acquiring new Digital Partner every month.
- ☐ New lead Generation.
- ☐ Cold calling, Sale Training.
- ☐ Research and Development According to the market.
- ☐ Maintain and keep track of all records of sale closure and Follow up
- ☐ Client acquisition by selling of various products relating to Mutual fund, life insurance & health insurance.
- ☐ Handling Branch Sales of Branches New Delhi Module.
- ☐ Relationship Module from Local Head office, Branch relationship executives and Branch Relationship Manager.
- ☐ The entire Portfolio of Sales / Office expenses / Team expenses to be managed so that the centre is into profit module.
- ☐ Generation Sales by training of Sales Team of Relationship Officers.
- ☐ Driving all the sales channels & teams to meet the set monthly, quarterly & yearly targets.
- ☐ Ensuring profit margin of the Unit allocated in the Retail Asset Centre done through DST Team.

F6 FINSERVE PVT LTD
Senior Acquisition Manager- September 2013 to September 2017

- ☐ Client acquisition by selling of various products relating to Dmat Accounts, Trading accounts.
- ☐ Acquiring new client (Corporate & Individual).
- ☐ Client acquisition by selling of various products relating to equity market to corporate.
- ☐ Established and maintained new D MAT accounts.
- ☐ Procurement of financial products to the client to increase brokerage.
- ☐ Enable business growth by developing & managing a network of dealers/ advisers.
- ☐ Driving all the sales channels & teams to meet the set monthly, quarterly & yearly targets.

BAJAJ CAPITAL LTD

Sr. Personal Financial Planner-August 2011 to August 2013

- ☐ Selling all insurance products.
- ☐ Cold calling.
- ☐ Mobile venue selling in one day
- ☐ Selling all medical policy. And another in general insurance product.
- ☐ Selling in round table insurance
- ☐ Driving and managing the entire sales process – targeting to top prospects, identifying client solutions, negotiating and closing.
- ☐ Acquisition new Clint and give the Presentation and sale the Product.

EDUCATIONAL QUALIFICATION:

- ☐ PGDWM (General & life Insurance) from International College of Financial Planning New Delhi 2009-2011..
- ☐ B.A. Passed from G. F.P.G. College in 2005.
- ☐ 12th Passed from U.P. Board in 2002.
- ☐ 10th Passed from U. P. Board in 2000.

PROFESSTIONAL QUALIFICATION:

- ☐ Composite Broker in NIA (National Insurance Academy).
- ☐ Certificate in Email Marketing.
- ☐ Certificate in Engine Marketing.
- ☐ Certificate in Retail Management.
- ☐ Certificate in internet Marketing.
- ☐ Pursuing licentiate in III (General insurance) in INDIA
- ☐ Permanent membership of III (Insurance Institute of India) Delhi.

TECHNICAL QUALIFICATION:

- ☐ Operating system, MS DOS, MS Office, Windows 7, XP2000.
- ☐ DOA (Diploma in Office Automation)

STRENGTH:

- ☐ Fast Learner adapt well to changes.
- ☐ Smart worker, sincere, honest and committed to excellence.

Personal Details:

Marital Status:	Married
Date of Birth:	5 th JUN 1984
Father's name:	Mr. Chander Pal
Languages known:	Hindi & English
Nationality:	Indian
Address:	4/231, Vikas Nagar Lucknow – 226022, Uttar Pradesh, India.
