

CURRICULUM-VITAE

MUKESH BABU

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

POLICY BAZAAR: August 2021 to Till Date.

SRM -Retail lending BY POS

In LUCKNOW.

❑ Retail/ Agency sales /Training of All POS.

- ❑ Meeting acquisition target month as planned
- ❑ Ensuring the centre to be in Profitability by determining right kind of strategy
- ❑ SME insurance business target.
- ❑ Ensuring the NPA levels not to increase with the Collection Team
- ❑ Sales targets of LI/ GI/HOME INSURANCE / Motor insurance .
- ❑ 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.
- ❑ 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/HL...
- ❑ 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.
- ❑ Daily Monitoring of Primary and cluster Sales Issuance.

Turtlemint
Unit Manager – October 2017 to September 2019

- ☐ Working as Unit Manager in New Delhi
- ☐ Client acquisition by giving Presentation in MINT PRO.
- ☐ Acquiring new Digital Partner every month.
- ☐ Acquiring new client Two-wheeler & four wheeler agent and including commercial vehicles.
- ☐ Client acquisition by selling of various products relating to Mutual fund, life insurance & health insurance.
- ☐ Generating leads, follows –ups responsible for sales.
- ☐ Enable business growth by developing & managing a network in Digital partner
- ☐ 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 product.
- ☐ 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 Client and give the Presentation and sell the Product.

EDUCATIONAL QUALIFICATION:

- ☐ PGDWM (General & life Insurance) from International College of Financial Planning New Delhi 2009-10.
- ☐ MBA (Marketing) passed from CSET Lucknow in 2007-09.
- ☐ 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).
- ☐ 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.
