

Curriculum-Vita

Saurabh Sharma

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OBJECTIVE

A highly motivated and results-driven professional with extensive experience in sales and team management, dedicated to driving business growth by leading high-performing teams, fostering customer relationships, and implementing effective sales strategies. Committed to delivering exceptional service, meeting sales targets, and contributing to the success of the organization while staying updated on industry trends and customer needs. Aiming to leverage my skills and knowledge to provide tailored solutions and achieve long-term business objectives.

SKILLS & ABILITIES

1. Client and Account Management	6. Analytical and Problem-Solving Abilities
2. Proficiency in using CRM software	7. Excellent verbal and written communication skills
3. Leadership and Team Management	8. Good in Excel and word processing
4. Sales Strategy and Planning	9. Sales and Product Knowledge
5. Performance Tracking and Reporting	10. Adaptability and Resilience

SUMMARY

Professional with 10 years of experience in Banking and Insurance services with great skills of customer management by serving them best of our resources, Building a strong relationship with the sales team of the bank channel partners. Having good communication skills with problem solving approaches. Managing sales pipeline and creating valuable reports. Developing marketing strategies for more Client gathering.

JOURNEY

- I am currently working in IndiaFirst Life Insurance Company Ltd. as Sr. Business Development Manager Sales from Feb 2025
 - ⇒ Assist in identifying potential clients and new business opportunities for insurance products (life, health, general, etc.).
 - ⇒ Support in preparing sales presentations, proposals, and client communication materials.
 - ⇒ Conduct market research and competitor analysis to identify trends and opportunities.
 - ⇒ Coordinate with internal departments (underwriting, claims, customer service) to ensure smooth onboarding of new clients.
 - ⇒ Maintain and update CRM systems with leads, client details, and activity logs.
 - ⇒ Assist in organizing promotional campaigns, roadshows, and client meetings.
 - ⇒ Follow up with potential clients and schedule appointments for senior team members.
 - ⇒ Prepare regular reports on business development activities, pipeline status, and KPIs.
 - ⇒ Support the team in achieving sales targets and strategic goals.
- **1.5 year working experience with TATA AIA Life as ISM (Last working date - 28th Nov'24)**
 - ⇒ Research prospective accounts in targeted markets, pursue leads and follow through to a successful agreement
 - ⇒ Maintain relationships with current clients and identify new prospects within the area you have been assigned
 - ⇒ Possess a strong understanding of our products, our competition in the industry and positioning
 - ⇒ Follow the latest industry developments and stay up to date on corporate competitors

- ⇒ Maintaining relationship with clients and Insurance brokers and driving sales through them
- ⇒ Collaborating with underwriters, product development and operations to develop strategic sales initiatives.
- ⇒ Developing a higher top line and minimizing loss ratios on a quarterly basis.
- ⇒ Organizing events and activities for promoting core products

O 6 Months Experience in HDFC Life as a SENIOR CORPORATE AGENCY MANGER from 19/Dec/2022 to 30/June/2023

- ⇒ Build a strong relationship with the sales team of the bank channel partners.
- ⇒ Achieve sales targets as per channel strategy.
- ⇒ Meet prospective customers with the channel sales team to sell insurance solutions.
- ⇒ Provide pre-and post-sales support (e.g., claim settlement)
- ⇒ Ensure quality of business and persistency (renewals of premium)
- ⇒ Enable channel sales team to use the latest digital platforms.

O 4 Year Experience in Axis Bank as an AM from 2/Nov/2018 to 29/Oct/2022

- ⇒ Selling of banks and third-party products to new customers.
- ⇒ Conducting marketing activities and travel locally to meet new customers as a daily activity.
- ⇒ Contacting existing customers for more deposits and cross selling of more products.
- ⇒ Achieve sales targets as assigned by the organization on a daily and monthly basis.
- ⇒ Complete all learning activities conducted by the bank from time to time.
- ⇒ Daily entry of interaction with customers in bank's CRM system.

O 2 Year Experience in HDB FS as SSO from 1/Nov/2016 to 30/Sep/2018

- ⇒ Building relationship with prospective client
- ⇒ Managing Sales pipeline and ensuring Business target.

O 1 Year & 10 Months Experience in Lal Bahadur Shastri Training Institute as a Computer Teacher from 01/Jan/2015 to 31/Oct/2016.

O 1 Year Experience in Daksh Technology (IBM) as a Trainee from 10/Jan/2013 to 31/Dec 2013

ACHIVEMENTS

- O MD/CEO MDRT Award Achievement in 2021**
- O Croatia contest clear in TATA AIA (Target- 50 Lac - Achievement- 1 Cr) 2023**

EDUCATION

- O Accurate Institute of Management Greater Noida- MCA**
- O M.I.T Engg College, Bulandshahr- BCA**

SOFTWARE PROFICIENCY

- O Programming language: C, C++, C#**
- O DBMS Packages: MS Access, Oracle 10g & 9i, MS SQL Server**
- O Operating Systems: Windows98//2000/XP/7**
- O Web Designing: HTML, ASP.NET, Web Hosting O Framework**

STRENGTHS

- Positive approach towards life.
- Able to handle adverse situation.
- Easily manage task and supporting nature.
- Self-Motivated
- Able to Work in a team as well as individually also
- Strong will power

DECLARATION

I do hereby declare that the particulars of information and facts stated here in above are true, correct, and complete to the best of my knowledge and belief.

Date: _____