# Vikas K. Jeshnani

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**Work Experience**

1. **Currently working with Weizmann Forex Ltd. as Territory Manager since May 2013**

**Details of the work:**

• Designated as Territory Manager in Western Union Business Solution vertical in Weizmann Forex Ltd.   
• Achieving new acquisition and revenue targets as per Business Plan for Western Union Business Solution vertical.  
• Implement strategies for market penetration by identifying and influencing prospective clients & explore marketing budgets.  
• Conduct Workshop for potential customers and Learning and Training Module for the territory  
• Acquisition of new customers for Inward and Outward Remittance Solution a niche product offered by Weizmann and Western Union in India.  
• Achieving budgeted Target with Sales and Telesales team.  
• Building & Managing team of (Area Managers & Lead Generation Team) in terms of coordination, motivation for delivering high Performance.  
• Developing local level relationship with all Trade Organizations in the designated territory.  
• Daily/Weekly/Monthly/Quarterly performance reviews of the performance of field staff and update Zonal Head regularly on the same.  
• Maintaining Daily/Weekly/Monthly/Quarterly MIS of the Business generated and Claims of the allocated State/s and update Zonal Head regularly on the same.  
• Provide efficient and prompt Customer Service

1. **Worked with Angel Broking Limited as Manager- since June 2010-June 2012**

**Details of the Work:**

1. **B2BSales and Product Management:**

* To engage with the central marketing team for creating newer acquisition formats.
* Developing and promoting products based with reference Channel Partner Acquisition
* Designing the channel partner engagement activities
* Running marketing collaterals that ensure brand visibility
* Running BTL activities for Channel partner acquisition
* Coordinating with vendors for running marketing campaigns
* Ensuring growth in channel Partners in terms of numbers through acquisition team based out in Branches
* Looking after the servicing of the channel partners through the relationship team based out in the Branches
* Carrying out activities for increasing the activation and productivity of channel partners

1. **Sales Training and Development**

* Conducting training for on roll employees for certification (NCFM, BCFM and NISM) Pan India
* Motivating them to go for more number of certifications
* Keeping incentive schemes for the certification
* Preparing content for the training
* Arranging and compiling mock test for the same
* Preparing training calendar for the same
* Carrying out training and development activities
* Preparing and delivering the training content
* Devising and conducting the training of the acquisition and servicing teams
* Planning, executing and driving the contest for developing the business
* Work in accordance with Human Resource for developing the intellect of Sales and support staff with reference to Financial markets
* Keeping track of expiry of the certificates and ensure timely renewal or getting extension on it
* Creating pool of certificates which can be used to avoid deactivation of terminals due to expiry of the certificates

1. **SALES MIS**

* Updating & maintaining all Sales MIS (Calls, Prospects, Attritions, Business done, etc.)
* Driving and monitoring Lead Management System PAN India

1. **Worked with BRICS Online as a Product Manager. Since September 2008 to May 2010**

**Details of the Work: A) Wealth Advisory (Mutual Funds, Equities, Fixed Income & Insurance)**

* Helping the relationship managers & acquisition team for closing the deals for HNI clients.
* Conducting presentations and sessions for the corporate for financial planning of their employees
* Doing Financial planning for the High Net worth Individuals
* Doing risk assessment of client
* Doing the Gap analysis between goals and the investment
* Asset allocation based on the risk profile and goals of client
* Cross sell, deep sell and enhance the customer value with the organization
* Monitor sales product wise, Relationship manager wise, branch wise

**B) Product Management:**

* To engage with the central marketing team for creating newer acquisition formats.
* Developing and promoting products based on wealth advisory
* Designing the investor engagement activities
* Running marketing collaterals that ensure brand visibility
* Running BTL activities
* Coordinating with vendors for running marketing campaigns
* To do and look after the alliances and tie ups with third party products

1. **Worked with Yes Bank as Relationship Partner. From May 2007 to September 2008**

**Details of the Work: Acquisition and Relationship Building**

* Developing amicable relations with clients as well as acquisition of new to bank customers (HNI and Priority) for expanding the business. By way of, Mutual funds, PMS Structured Products, Current and saving accounts, Fixed deposits Insurance (Life and General) Demat Accounts
* Developing strategies to enlarge the customer base of the branch based on market research while conceptualising, planning and implementing processes to drive business in terms of value and volume growth.
* Generating business from various channel partners for the company while establishing healthy business relations with clients & external associates for securing repeat business & long term customer loyalty and worked towards solving their queries and complaints efficiently.
* Conceptualising and implementing promotional activities as a part of market development and brand building effort for new products, features, etc., and to maintain relationship with the customer.
* Carrying out smooth planning/execution of Sales & Promotion Plans for generating more revenue for the bank.

1. **Worked with Kotak Life Insurance as Assistant Manager. From Jan 2005 to May 2007**

**Details of the Work: Channel Management**

* Managing Kotak Mahindra Bank as a Channel for insurance
* Providing support to Kotak Mahindra Bank’s sales team in selling insurance products.
* Lead generating, Follow up and closure of leads
* Provide Training to Kotak Mahindra Bank sales team with for Financial Planning, Need analysis and insurance
* Conducting Prima facie underwriting of the proposal
* Following up with the sales team for completing the documentation after prima facie underwriting
* Coordinating with central operations unit for faster issuances of policies
* Look after the premium collection and try to eliminate the lapses and free look cancellations

**Educational Qualification**

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| --- | --- | --- | --- | --- |
| Examination | Year of Passing | Board/ University | Institute | Class |
| S.S.C.E | Mar 1998 | Maharashtra | Jaslok High School | First |
| H.S.C.E | Mar 2000 | Maharashtra | Smt. C.H.M Junior College | Second |
| Bachelors (Commerce) | Mar 2003 | Mumbai | Smt. C.H.M College of Arts, Commerce and Science | Second |
| P.G.D.B.M | May 2005 | Mumbai | Lala Lajpat Rai Institute of Management | First Class |

**Additional Qualification**

1. Cleared AMFI examination Advisors module
2. Cleared NCFM Examination on Capital Markets Dealer Module
3. Cleared NCFM Examination on Derivative Market Dealer Module
4. Cleared IRDA Examination
5. Cleared NISM Examination for Currency Derivatives
6. Cleared NCFM Examination for Commodities
7. Cleared BCFM Examination for Securities Market
8. Currently pursuing Certified Financial Planner Program from Financial Planning and Standards Board of India

**Personal Information**

**♦** Date of Birth : 2nd October 1982.

**♦** Marital Status : Married

**♦** Sex : Male.

**♦** Languages Known : English, Hindi, Marathi, and Sindhi.