**D. Prasad**

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| --- | --- |
| Targeted Role Title | : Senior Manager / Team Handling |
| Current Functional area | : [Financial Services](https://www.naukri.com/financial-services-jobs" \o "Financial Services Jobs" \t "_blank) , [Banking](https://www.naukri.com/banking-jobs" \o " Banking Jobs" \t "_blank) , [Investments](https://www.naukri.com/investments-jobs" \o " Investments Jobs" \t "_blank) , [Insurance](https://www.naukri.com/insurance-jobs" \o " Insurance Jobs" \t "_blank) |
| Preferred Industry | : Sales / Marketing / Customer Service |
| Current Location | : Hyderabad, Telangana, INDIA |
| Preferred Location | : Hyderabad / Anywhere in India |
| Languages knowledge | : English, Hindi and Telugu |
| Notice Period | : Ready to join as per requirement |

Qualification & Certifications

Academic: Master of Commerce, Osmania University, A.P.

Regulatory: NISM II B Certified, NISM V - A Certified & IRDA (LI) Certified.

Areas of Exposure

Ultra HNI segment | Wealth Management | Investment Advisory | Client Relationship Management | NRI banking | Private Banking | Equity, Finance & Mutual Funds | Insurance & Cross Selling | Sales Management & Customer Satisfaction | Regional Management | Distribution | Target Achievement | Business Expansion | Retail Banking |

Previous companies job titles and tenure of employment

|  |  |  |
| --- | --- | --- |
| Company name | Job title | Period of employment |
| ICICI Securities Ltd | Senior Wealth Manager | Sep’2014 to Sep’2016 |
| HDFC Bank Limited | Preferred Relationship Manager | Jan’ 2010 to Sep’2014 |
| ICICI Bank Limited | Manager Investment & Services | Sep’2007 to Jan ‘2010 |
| ING Vysya Life Insurance Co. Ltd | Sales Manager Retail Agency | Jan’2006 to Sep ‘2007 |
| American Express Services (I) Ltd | Territory Sales Manager | Nov’2003 to Dec’2006 |
| HBL Global Private Ltd | Senior Sales Executive | Jul ‘1997 to Oct ‘2003 |

Experience profile - Principal Accountabilities are **including, but not limited to the role**



Senior Wealth Manager - Premier

ICICI Securities Limited, Location: Hyderabad

Role Description:

Goals delivered:

* Acquired on an average monthly 3 high value relationships into the HNI Equity Broking vertical.
* Managed 30 Large Trader Clients, 20 Big Ticket Size, 50 HNI Client’s Acquisition, retaining & enhancing advisory relationship & service.
* Recruited team of dealers, sales RM’s and Advisors balancing the attrition.
* Driving team for business generation for acquisition and revenue generation as per the parameters.
* Generated consistently an average monthly revenue of 4.0 Lakhs from existing customers mapped and from new clients.
* Achieved budgeted targets in terms of number of clients, volume of business & assets.
* Executed cross sell efforts as per focus of the organization at any given point in time.

Role description:

* Prospecting, acquiring and retaining premier clients
* Upkeep self-updated on the financial markets and in advisory products / services in particular.
* Undertake research, investigation and be updated on available investment opportunities/financial market trend to determine whether they fit into clients’ portfolios
* Understanding the client’s needs & requirements and accordingly position the products & services.
* Coordinating with product and research team for taking investment decision for the clients
* Recommend the strategies clients can use to achieve their financial objectives, including specific recommendations in such areas as cash management, insurance coverage other than investment planning also to ensure a one-point relationship for the client.
* Contacting the clients periodically and determining if they are satisfied with the service and returns generated. Also, reviewing their investment needs to determine whether market changes, life changes, economic changes, or financial performance indicate a need for portfolio reassessment.
* Providing various investment performance reports and summaries to the clients in regular intervals.
* Building and maintaining client bases, along with relevant comments/remarks for future reference
* Guiding clients in the gathering of information/documents required such as bank account records, income tax returns, life and disability insurance records, pension plan information, and wills, etc.
* Conducting and assisting in organizing seminars, workshops and other business development activities.
* Preparation & maintenance of the MIS reports in the specified formats as required by the management.

HDFC BankPreferred Relationship Manager

HDFC Bank Limited, Location: Hyderabad

Goals delivered:

* Acquired 2 resident, 2 current account, 1 NR new to bank relationships per month.
* Managed 100 preferred client’s overall relationship worth of Rs.75 Crore.
* Garnered consistently an average monthly revenue of 3.50 Lakhs from the portfolio.
* Delivered my share branch targets in terms of cross sell, investments, CASA, FD, liabilities & assets.

Role Description:

* Identifying, acquiring and servicing NR customers with book size of 20cr.+ for their wealth management needs.
* Managing & maintaining the highest customer satisfaction levels through pro-active client engagement & relationship management
* Achieving monthly & annual sales targets from NR clients. Excellent implementation & execution of relationship management & investment advisory strategies.
* Ensuring sales spread between products. Aiming to balance NTB (New to Bank NR customers) with increased penetration of existing NR customers to deepen the wallet share.
* Drive and delivering a radical improvement in customer service in the NR markets market through dynamic service leadership and the implementation of customer service strategy.
* Ensure highest levels of customer satisfaction. Interacting with new customers to detail & explaining all features & functions of products & assisting in on boarding of NR customers. Ensuring service levels are constantly improving.
* Managing customer’s issues on service or FX/investment needs. Escalate for resolution whenever required. Probing and identifying requirements to provide appropriate solutions to customers.
* Possessing complete knowledge on all products (SA, TD, Investments, FX and insurance) & services. Leading to resolve all queries & complaints. Full training & briefing on all product launches & upgrades to new entrants.
* Research client’s complaints & compliments. Analyze & suggest innovations & ideas on product & service improvement in addition to service level improvements.
* Attuned to the current economic and financial markets so as to be current and proficient in attending to customer’s queries.
* Working hand in hand with fellow CBG RMs and Service Managers to ensure that all objectives of the team are met and there is team harmony and unity.
* Being compliant with operations risk and rigor requirements e.g. KYC and anti-money laundering measures.
* Establishing HDFC Bank as a wealth management provider in all NR markets. Undertake frequent competitor analysis so that HDFC product suite is in line with (or ahead of) competing banks.
* Facilitating the distribution of third party investment products to customers, after taking into consideration the risk profile and investment objectives of the customers.

Manager Investments & Services

ICICI Bank Limited,

Location: Hyderabad

Achievements:

In three years’ tenure, the management selected and gave me an opportunity to give my best in multiple sections such as - retail bank branch front end operations, assets business sourcing, investment services, in which my efforts were appreciated by the management even now when we meet in client business meetings.

**ICICI Bank** extensively leverages the ICICI Branch as a platform for cross-selling asset insurance products along with its numerous banking product packages across the country provides a vibrant base for insurance penetration to its customers.

The clients still continue contacting me for queries related to their earlier and present banking requirements conveniently.

My reporting authorities feel glad to see my suggestions gave weight age in restructuring the strategy action plans for the region for that financial year.

My team believes I can ensure their growing financial needs to cover up with their incentive earnings witnessing my earning and they share the path blocks if any after giving a full hit at their levels then discuss with me to overcome.

Sales Manager Retail Agency

ING Vysya Life Insurance Company Ltd,

Location: Hyderabad

Goals delivered:

* Acquired 5 qualified advisors per month.
* Managed 50 advisors’ self plus transferred new business premium worth of Rs.1 Crore p.a.
* Ensured advisor earning consistently an average monthly commission of 2 Lakhs.
* Able to deliver 70% of my share target by the management.
* I was leading among my colleagues to select advisors meeting management criteria for each batch for that month with cent
* Able to get on an average two advisors qualified in every contest.

Role Description:

* Understanding the organization structure, sales force portfolio and territory spend to advise floor managers/area heads in effective resourcing strategies
* Engaging with several stakeholders within and across sales management for recruit and working across several external groups as well as advisors for driving contests across the organization
* Engaging with advisors and organize monthly / quarterly earnings reviews of our branch.
* Defining and publishing a contests calendar, set-up quarterly meetings, coordinate logistics, distribute/manage agenda, and facilitate achievers in each meeting to track progress
* Assisting the reporting team to reporting customer’s objections across advisors. Ability to understand reporting scenarios and suggest key handling views by the stakeholders (area managers and business managers). In parallel, work with marketing team and business managers to assist in creating use cases and supporting documents.

American Express

Territory Sales Manager

American Express Services India Ltd.

Location: Hyderabad

Role Description:

I reached from 21st to 8th position to contribute business to my territory in a span of initial 9 months.

Our management gave additional work of MIS presentation, reporting of location business responsibility to my existing role that I handled by an hour day stretch.

I practiced & shared a business lead generation model to my colleagues to achieve targets given by management which later become a mandatory practice for all.

* Selling personal loans product
* Analysing credibility
* Procurement of new customers
* Marketing of product and cross selling
* Ensuring loans disbursements is done within in TAT.



Senior Sales Executive - Loans,

HBL Global Private Ltd DST: HDFC Bank Ltd.

Location: Hyderabad

Role Description:

Key Requirement for the Position: Overall responsibility to grow Business for the designated territory.

Responsible for smooth functioning & importance of Personal Loans as a business source contributing to profitability of DST as per targets set.

* Develop distribution model which should be cost effective and helpful in growing business rapidly
* DST business expansion, Target achievement & Control on cost of acquisition
* Meeting the Business/sales targets for the region on monthly, quarterly and annual basis Volume nos., and Turnovers.
* Coordinating and ensure the collection Targets on Daily, weekly and monthly basis.  
  Timely Funds Inflow and disbursement of finance to the customers
* Customer satisfaction level & Building client relationship internal and external.

D. PRASAD.

References: available on request