**SUMIT GULATI**

**Contact:**+91-9988871222 ; **Email:**sumitgulati002@gmail.com



**OBJECTIVE**

*Seeking a position in an organization that provides me ample opportunity to explore & excel while carving out the niche for personal, professional as well as organizational goals* ***in the field of Financial Services Sector.***



**SUMMARY OF SKILLS**

* Highly motivated and goal oriented professional with experience in **customer relationship**, **client servicing, documentation,** currently spearheading as **Senior Finance Service Manager with ICICI Prudential Pvt Ltd.**
* **Well versed with all the Insurance Products** and possess in knowledge of **Sales, Marketing, Business Development, Distribution, Client Relationship Management, Liaison & Coordination and Brand Promotions**.
* Exceptional skills in understanding client needs and requirements and offer best possible solution to meet their long term requirements and establish excellent rapport and relation.
* Excellent time management skills with proven ability to work accurately and quickly prioritize, coordinate and consolidate tasks.

**Core Competencies**

Team Leader, Relationship Management , Coordination, Meeting Objectives, Identifying Problems, Promoting Solutions, Managing Change, Group Insurance, Customer Service, Administration & Communication Skills



**PROFESSIONAL EXPERIENCE**

**ICICI Prudential Pvt Ltd**.

**Senior Financial Service Manager Jun’14 – Till Date**

* Maintain cordial relationship with the Bank Branch Manager and bank staff members.
* Generate leads from the bank branches.
* With the assistance of the Bank Manager help in closing insurance plans and generating revenue for the bank branch.
* Service the existing customers by retention.
* Organize training programs to train and motivate bank staff to optimize potential and improve retention of existing customers.
* Solicit new customers through approved techniques and methods
* Maintaining day to day accurate productivity records and reporting to supervisors.
* Achievement of product-wise targets by ensuring client contactability at all times
* Regular contact with all mapped clients through weekly / monthly calls

**Tata Business Support Services Ltd. Sep'11 – Jun'14**

**Customer Service Executive**

* Increase the level of sales by offering best class services.
* Ensuring timely and professional responses to all complaints, request and queries received enabling satisfaction of customers.
* Achieving sales target allotted in terms of value and numbers.
* Undertake all responsibilities with reference to procedures.
* Building & Maintaining healthy relations with clients for cross selling various products.
* Ensuring that highest service standards are maintained for servicing of clients.
* Maintaining excellent relations with clients to generate avenues for additional business
* Maintaining timely MIS, trackers and present it to the top management to minimize wastage.

**NOTEWORTHY HIGHLIGHTS**

* Successfully acheieved YTD goalsheet of 1.2 cr wrp.
* Logged in insurance upto 67 lakhs wrp and qualified for EVP club GOA.
* Qualified for contest Freedom To Dream in August'14
* Rank 1st Star of the Month in TBSS Ltd.



**EDUCATIONAL CREDENTIALS**

**MBA (Marketing), 2013**

Panjab University

**Graduation, 2010**

Gian Jyoti Institute of Management & Technology (Punjab Technical University)

**Intermediate, 2007**

Lawerence Senior Secondary School (C.B.S.E. Board)

**Matriculation, 2004**

Lawerence Senior Secondary School (C.B.S.E. Board)

**Certifications**

* MS Office Application

**Computer Proficiency**

MS Office and Internet Applications



**Date of Birth:** 2nd October 1989

**Permanent Address:** HE-1058 Phase-1 Mohali (S.A.S Nagar)

**Hobbies:** Listening to Music, Travelling and Interacting with people

**References:** Available on request