

TRUSHANG MAKWANA

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Career Objective

To learn and grow in a professional working environment where I can utilize my academic qualification and personal skills, which would enable me to grow while delivering the desired output thereby contributing to the organization growth.

Work Experience

KOTAK MAHINDRA BANK (Current)

RELATIONSHIP MANAGER–SALARY 2 WEALTH (AHMEDABAD)

- **Relationship Management:** Build and maintain the relationships with existing clients holding corporate salary account product at the bank and understand their financial needs and preferences.
- **Client Needs Assessment:** Conduct thorough needs assessments to identify potential cross-selling opportunities based on clients' financial situations, lifestyles, and future goals.
- **Financial Analysis:** Analyze clients' financial profiles, transaction history, and behavioral patterns to identify suitable products or services that may benefit them.
- **Cross-Selling Strategy:** Develop and implement effective cross-selling strategies by providing diversified solutions to the clients based on their needs.
- **Relationship Enhancement:** Proactively engage with clients by staying in touch, providing updates on new products, services, and promotions, and addressing any inquiries or concerns they may have by activity drives at corporate client offices.
- **Collaboration with Product Specialists:** Collaborate with product specialists and other departments within the bank to ensure comprehensive and accurate information is provided to clients during the cross-selling process.
- **Sales Targets and Performance:** Set and achieve sales targets, monitor, and report on sales activities and outcomes, and identify strategies to improve cross-selling effectiveness.
- **Customer Service:** Provide excellent customer service by promptly resolving issues, addressing complaints, and maintaining a high level of professionalism and integrity.

RATNAMANI METALS & TUBES LTD (AHMEDABAD) (From July 2022 till Dec 2022)

MARKETING OFFICER - CARBON STEEL PRODUCT

- - Management of all commercial activities for carbon steel as a product.
- - Regular communication with vendors to maintain relationship for ongoing services
- - Daily tracking of payments that are to be received against the dispatched materials.
- - Verify all Purchase orders and consult with the Legal team, to ensure if they are in accordance with the agreed payment terms for each vendor.
- - Detailed analysis of the payment advice received from the vendors.
- - Handling and resolving all the post sales queries
- - Management of all banking related activities for the product such as ABG (Advance bank guarantee), PBG (Performance bank guarantee), and more.

HDFC LIFE INSURANCE COMPANY LIMITED
(AHMEDABAD) (From Aug 2019 till Jun 2022)

Sr. Corporate Agency Manager - BANCASSURANCE

- Associated with BANCASSURANCE Channel to support NRI and Private Banking Group customers and their requirement trends in Life Insurance business to find out opportunities for our sales force to get targets achieved.
- Expediting and smoothening the process of a life insurance product in the system by coordinating with our Operations team for better and efficient results.
- Resolve and manage the policy servicing issues of the sourced policies on a day to day basis to plan and achieve the business goals.
- Support NRI relationship managers to grow the insurance business and achieve the market share as compared to peers.
- Managing quality of business processes that includes new business services, Renewals, Collection and other business levels.
- Driving Insurance Business at the assigned branches of Bank and developing business through Bank branch and Bank Database.
- Worked in a Multi-Tie up competitive environment in HDFC Bank channel, and maintained 70% market share MOM of HDFC Life within HDFC Bank channel.
- Maintained 98% Persistency within Channel and Improved after sales customer's experience.

KOTAK LIFE INSURANCE LIMITED
(MUMBAI) (From Nov 2017 till Jan 2019)

Deputy Manager Sales - Sales Team

- To get better interpretation and explanation for our sales force regarding the requirements of Privilege HNI Customer for Life insurance products.
- Liaise with various Relationship Managers Teams in the South Mumbai Cluster to help better and faster decisions on un-resolved customer cases.
- Tracking of policies and reporting the same to Zonal manager for business decision making.
- Focus and follow-up with our Relationship Managers in South Mumbai cluster for on boarding of new customers
- Analyze customer trends in business to find market opportunities that in turn helps the sales force to achieve set targets.

Skills

- Creative thinking with great diversity to adjust in any type of work environment.
- Able to negotiate in a positive manner and handle problem resolution activities proactively.
- Responsible attitude aimed at ensuring positive outcomes of assigned projects.
- Exceptional relationship building skills targeted at ensuring teamwork and customer service.
- Excellent ability to adapt to changing work environments.
- Proven ability to motivate employees to make the most of their potential.
- Excellent networking skills aimed at generating business and ensuring loyal clientele.
- Well versed with MS Excel, MS Word, and Power Point.

Academic Profile

Degree	Institute	University/ Board	Year of Passing	Performance
B. Com	K.R. Doshi College	University of Gujarat	2016	45%
XIIth	Fatima Convent High School	GSHSEB	2012	75%
X th	Gujarat Public School	GSHSEB	2010	63%

Personal profile

Name	Trushang DhirajBhai Makwana.
D.O.B	5 th May 1993.
Permanent Add	Ambavadi, Mangla Mata Chowk, Rudrakshbunglows C1234
	Bhavnagar 364001
Gender	Male
Marital Status	Married
Languages	English, Hindi and Gujarati