



+91 6358858397



birju.p1984@gmail.com



Ahmedabad, Gujarat.



# BIRJU PATEL

## NOTABLE ACCOLADES



- **Promotions:** India InfoLine (IIFL).
- **International & Domestic Conventions:** Tashkent, Shimla & Manali (Bharti Axa).
- **Appreciated by Regional Head** for consistence performance in Max Bupa.
- **Appreciated by Zone Head** for 35 Lacs business in GI with Rolledge.
- **Consequent performer** in business targets with Bharti, Rolledge, India Infoline, MNYL & Max Bupa.

## ACADEMIC

### BACHELORS OF ARTS

AMFI Certified

## PERSONAL DOSSIER

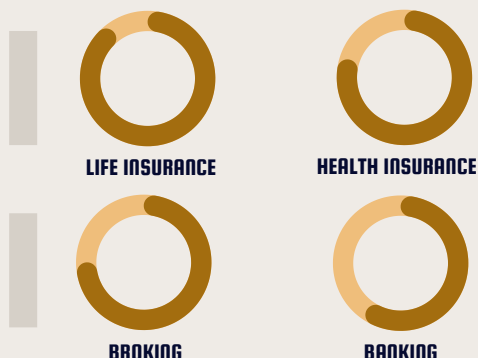
DOB: 30 May 1984

Married

## CORE COMPETENCIES

Leadership	<div></div>
Virtual Sales	<div></div>
Relationship Management	<div></div>
Business Development	<div></div>
Operations	<div></div>
Key Account Management	<div></div>
Cross-Sell	<div></div>
Training & Development	<div></div>

## INDUSTRY EXPOSURE



## PROFILE INFO

Seasoned & Result Driven Sales Professional with more than a decade of experience in Team Handling, Sales, Marketing, Direct Sales, Cross-Sell, Virtual Sales & Service Delivery, Customer Service, Client Retention, Partner Relationships, Strategic Planning & Execution, Relationship Management and Business Operations experience in Insurance, Broking & Banking Industry

**Grown from Executive to Area Head Level, worked with big companies Ratnaafin, Max Bupa, Bharti Axa, Rolledge, IIFL, Kotak, HDFC Securities & Max Life. Carrying a business acumen, problem solving & decision-making skills in day-to-day transitions for contact center and in leadership role. Dexterous and well experienced in building & managing teams to achieve desired organizational goals.**

## AREA OF EXPERTISE:

**Leadership:** Engage, mentor, support and motivate the team in their development and integration into the positive values and culture within the organization. Plan for assessing the skills, values, and knowledge of the team as per the standards that applies to their role to devise individual and team. Using coaching methods, demonstrations, participatory roleplays, and provides constructive feedback on performance.

**Sales & Marketing:** Possess excellent communication and organisational skills with proven abilities in sales & marketing and revenue generation execution planning. Adept at reporting to clients as well as interacting with internal and external customers. Managed and motivated the team and demonstrated performance individually and team wise performance and delivering results & maximize productivity.

**Virtual Sales/Cross-Sell:** Handled Tele-sales with Max Bupa, MNYL & Rolledge, handled Cross-Selling. Lead generation and closing end to end sale with team-coordination (including documentation process) along with maintaining customer compliances.

**Customer Service:** Skilled in providing end-to-end Customer Service Delivery Solutions along with strong capabilities implementing the Service Delivery Process covering capacity management, service level management, resolution process and control Process.

**Training & Development:** Demonstrated and trained team and self with role plays and scripts as per organization sales process requirement. Leading, training and monitoring performance of the team members for maintaining excellence in the service operations.

**Business Development:** Identifying prospective clients, generating business from new prospects & developing them to achieve consistent profitability. Building and maintaining healthy business relations with major clientele, ensuring maximum customer satisfaction by achieving performance parameters delivery & quality norms.

**Relationship Management:** Excellent communicator, able to work with sales and marketing teams and build rapport with customers. Strategic thinker with an analytical mind and strong problem-solving skills. Maintain strong relationships with customers, stakeholders, clients to boost company brand and profits in the long run.

## WORK EXPERIENCE

RATNAAFIN INSURANCE BROKING PVT. LTD.

16 AUG 2021 - PRESENT

### AREA HEAD (GUJARAT)

#### AGENCY & CROSS-SELL (LIFE INSURANCE)

##### Key Result Areas:

- **Role** - Responsible for managing Sales, Business Development, & Service and driving (Agency & Cross-Sell) Life Insurance business through broking relationship channel.
- **Geographical & Branches** - Assigned Broking Companies, coordination with Channel Partners staff, Branch Managers, Senior Management & Regional Level managers for Gujarat region.
- **Business Planning** - Achieve the monthly assigned revenue targets through effective cross-selling, generating sales income across products. Drive business plans and manage as per company standards.
- **Organizational Effectiveness** - Expert at creating and utilizing feedback systems to address the training needs.
- **Activity Plan** - Planning & execution of monthly activities, conceptualizing, planning, implementing, counselling for regular flow of business.
- **Team Review** - Periodic reviews of performance with front line and regional teams to ensure growth sales target and driving sales initiatives to achieve the desired objective.
- **Process** - Strictly adhere to internal control policies. Ensure that the organization's activities are carried out in accordance with all regulatory broking and company regulations.
- **Product Training** - Conduct training for internal stakeholders on products and benefits or product knowledge gaps that need to be addressed.
- Monitor & take necessary corrective action to ensure high levels of persistency across the Region.
- Execute R & R mechanism to increase business volumes.
- Ensure continuous training and development, skill enhancement of team members.

MAX BUPA HEALTH INSURANCE (NIVA BUPA)

JUL 2019 - AUG 2021

### CENTER HEAD (GUJARAT)

#### VIRTUAL SALES (HEALTH INSURANCE)

##### Key Result Areas:

- Responsible for generating and sourcing health insurance business through HDFC BANK VRM Channel.
- Interact with Bank employees and tele sales team and motivating them for business.
- Launch new initiatives as per company strategic plans and driving them successfully.
- Create positive environment with bank team and interacting with 80 VRM team to generate insurance business.
- Daily monitor of lead generation and closures. Analysis of closing ratio and implementing the strategies.
- Ensure targets are met monthly through the tele-channel unit assigned.
- Analyze competitor's Positioning and analyzing the growth and increasing the sales.
- Developed business plans and managed required compliance as per company standards.
- Expert at creating and utilizing feedback systems to address bank team day to day issues.
- Leverage new initiatives/products launching, organizing training to tele-sales team, downloading with team and set a goal to achieving the results.
- Monthly meetings with bank team for business projection, sales planning, and execution with strategic initiatives.
- Proactively reviewed the performance and progress of individual and company objectives and targets.

BHARTI AXA LIFE INSURANCE

SEP 2018 - JUL 2019

### RELATIONSHIP MANAGER

DEC 2016 - JUL 2017

##### Key Result Areas:

- Responsible for sales and team handling for insurance sales and revenue generation through direct sales
- Responsible for handling three employees and generating sales revenue business
- Contributed to the development, implementation, monitoring and review of a business strategy that maximizes the net profit by driving sales.
- Develop and execute sales strategies to acquire new customers, generate and increase revenue to ensure that customers, Financial and Operational objectives are achieved.
- Constantly reviewed data and supported the reporting managers in providing realistic input into the sales teams.
- Proactively reviewed the performance and progress of individual and team to set objectives and targets.
- Spend time with teams and customers to understand and identify business issues in order to ensure the alignment of tactics and strategies.
- Manage the business pipeline by focusing on the sales process to ensure maximum lead generation and high closure rates for new business.
- Manage entire end to end leads closure process including approaching, explaining, financial analysis and closing.
- Possess excellent interpersonal, communication and organizational skills with proven abilities in team management and planning
- Significantly contributing towards the common goal of the organization routed thru the channel
- Maintaining sound relationships with central & regional operations to get things done within Turnaround time.

## BRANCH HEAD

### Key Result Areas:

- Responsible for running the branch as a profit center by achieving company's topline objective through achievement of new business premium.
- Role is supervisory in nature which is carried out through a direct team of 15 Relationship Managers for selling Mutual Funds, Insurance, and other investment products.
- New customer policy additions increase in active customer base and bottom line by achieving business targets.
- Responsible for increase sales figure & Promotional drives as per the company plan. Mapped new markets for the purpose of business growth.
- Adroitly managed the sales and branch operations, implemented company strategies, executed sales business plan & considered customer preference and drive business volumes.
- Generated 35 Lacs of General Insurance business, 20 Lacs of Mutual Funds and 8 Lacs of Life Insurance.
- 300% growth in new business premium of General Insurance sales, increased Mutual Funds sales to 100% and maintain 120% life insurance sales consistently.
- Improved branch performance levels from 70% to 300% achievement in Zone and Maintained top position in Zone as branch head.
- Responsible for evolving market segmentation & penetration strategies to achieve targets & identifying the gaps and strategically secure profitable business.

## PRIOR EXPERIENCE

- **Branch Head**, Rolledge IMF Pvt. Ltd. (Jul 2017 – Jul 2018)
- **Service Delivery Manager**, IndusInd Bank (Dec 2015 – Nov 2016)
- **Sr. Sales Manager**, India Infoline Ltd. (Dec 2010 – Nov 2015)
- **Relationship Officer**, KOTAK Mahindra Bank (Jun 2010 - Nov 2010)
- **Financial Planning Manager**, HDFC Securities, Baroda (Jun 2009 - Jun 2010)
- **CEIP Financial Planning Manager**, Max New York Life Insurance Co. Ltd., Ahmedabad (May 2005 - Jun 2009)

## TECHNICAL KNOWLEDGE

- *Good knowledge of user application systems (MS Office, Word, Powerpoint ).*
- *Expert Knowledge of internal processes, systems, and controls.*

## SKILLS & STRENGTHS

- Good communication skills both verbally and written.
- Highly organized and motivated.
- Good analytical and problem-solving skills, entrepreneurial attitude, sense of responsibility.
- Prioritizing and managing multiple tasks simultaneously.
- Executing process improvement initiatives.
- Works well with others toward a common goal as a team player.

**Birju Patel**