

CURRICULUM VITAE

SAGAR PATKAR

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Career Objective:

An individual with extensive in-depth experience in the banking industry with a huge range of abilities from providing support and leadership to successfully selling the bank's money, credit, and products. Looking forward to making a significant contribution to a financial institution that offers a genuine opportunity for progression.

CAREER SUMMARY:

- Over 15+ years of experience across the domain of Banking/Financial Services handling Sales – Marketing & Client Relationship Management.
- Currently heading branch @ **Ujjivan Small Finance Ltd. Swargate, Pune.**
- Handled branch sales team @ **YES Bank Ltd.** for approx 2.4 year.
- Handled branch sales team @ **Indusind Bank Ltd.** for more than 2 year.
- Handled Branch Banking @ **Yes Bank Ltd.** for more than 3 year.
- Handled Branch Banking @ **HDFC Bank Ltd.** for more than 3 year.
- Handled Shares & Dmat Trading @ **Religare Securities Ltd.** for more than 2 year.
- Handled Sales of Shares & Dmat Sales @ **India Infoline Ltd.** for more than 1½ years.

Organizational Experience

Total Work Experience: 15 Years+

Currently working as Sr. Branch Manager in Ujjivan Small Finance Bank Ltd at Swargate Branch, Pune from 23rd Feb 2024 – Till Date

YES Bank Ltd: Branch Manager: (8th May 2023 – 21st Feb 2024)

YES Bank Ltd: Sr. Sales Manager: (Dec 2020– April 2023)

Designation: Assistant Vice President

Key Responsibility Areas

- Responsible for the administration and efficient daily operation of a full-service branch office, including lending, product sales, customer service, and security and safety in accordance with the Banks objectives.
- Enhance and contribute to the growth of the company through Business Development.
- Provision of a superior level of customer relations and promotion of the sales and service culture through coaching, guidance, staff motivation Capability building, and manpower management.
- Achieve individual and branch sales goals through new business sales, referrals, and retention of account relationships.
- Maintain AOP (Annual Operating Plan) for the financial year i.e. to prepare and track product (liability, assets, and fees) wise.

- Track inflow and outflow of reports (like account closures, account opening, Fixed Deposit renewals/closures,etc.) and thus, daily business generation.
- Prepare and review monthly activity calendar of outbound activities for BSM/SOs on a weekly basis.
- Conduct daily morning huddles to discuss daily plans and agenda for employees.
- Segment the customer within the catchments of the branch to increase the Journal-Ledger base of the branch.

Worked with IndusInd Bank Ltd, Pune as Select Relationship Manager (Manager) From 10th Sep. 2020 to 5th Dec.2020.

Company: IndusInd Bank Ltd, Pune

Designation: Area Sales Manager

Duration: 28th Sep. 2018 – 09th Sep.2020.

Key Responsibility Areas

Sales

- Lead Staff of 10+ personnel by implementing training, engaging in proactive problem-solving, and ensuring company compliance.
- Supervise staff in operations such as account management, customer service, financial operations, and other bank functions.
- Acquiring new customers for liability accounts and third-party products by effectively managing the sale team and allocating daily jobs and workloads.
- Strategizes with various channel partners on prospecting and efficient & effective approaches to client segments
- Building up CASA book through various channels and increasing the region's retail and corporate deposits in the form of bulk deposits.
- Strives for cross-selling all products alongside the core product.
- Responsible for new customer acquisition for SME, Trusts, Housing Societies, Educational Institutes, Co-operative Credit Societies, co-op banks, and Religious entities accounts along with cross-selling.
- Offering value-added services to IBG clients such as Fee Management Solutions, Doorstep Banking Services, Corporate Internet Banking, EDC Machine, etc.
- Develops and continuously upgrades new innovative sales channels & techniques to maximize productivity.
- Ensuring a clean, safe, and friendly working environment.

Company: YES Bank Ltd, Pune

Designation: Deputy Manager

Duration: 29th Sep. 2015 – 27th Sep.2018.

Key Responsibility Areas

Sales

- To look after the privileged Current account (YES First Business) portfolio of the branch.
- To look after Trade Forex services under the portfolio customers.
- Responsible to retain existing customer's account with value build-up.
- Explore the possibilities of cross sales of Asset Products like Working capital, Business Loan, Home Loan, Personal loan, Gold Loan, EEG etc. to the portfolio customers.
- Look after the sales of all banking products like Mutual funds, Life Insurance, General Insurance, Credit Cards, Current and Savings accounts, High-Value FD's etc.

- Maintaining and reporting the daily sales reports.
- Establish and maintain high standard of sales quality as measured by productivity customer complaints and repeat business.

Company: HDFC Bank Ltd.

Designation: Assistant Manager

Duration: 3rd August 2012 -28th Sep.2015.

Key Responsibility Areas

Sales

- To look after the branch's overall savings & current account portfolio.
- Look after the sales of all banking products like Mutual funds, Life insurance, General insurance, credit cards, Current & savings accounts, FD & RD's, NRE/NRO accounts etc.
- Responsible to retain existing customer's accounts with value build-up.
- To look after Trade Forex services under the portfolio customers.
- Explore the possibilities of cross-sales of Asset products like Home loan, Personal loan, Gold loan, EEG, Business loan etc. to the portfolio customer.
- To procure and generate the business from Direct Banking Channel
- Maintaining and reporting the daily sales reports
- Establish and maintain high standard of sales quality as measured by productivity, customer complaints and repeat business.

Operations

- To handle balance inquiries, brief transaction queries, statement of balance conformation certificate issuance to customer
- To offer value-added services to customers and generate sales leads
- To ensure and observe the maintenance and updations of the Books and Records
- To prepare the MIS Reports

Customer Service

- To conduct the Preventive complaint management
- Ensuring the correct product information is disseminated.
- Responsible for processing customer instructions within the said TAT
- To prepare the **MIS** reports on the customer grievance and redressal

Company: Religare Securities Ltd.

Designation: Senior Relationship Manager-Dealing

Duration: 31st March 2010 -25th Jan 2012

Key Responsibility Areas

Sales & Business Development

- Advice clients on investment options and market trends.
- Provide research-based recommendations to the clients with the help of Technical & Fundamental analysis.
- Portfolio & Risk Management of clients.
- Improve business generation from existing clients.
- New HNI & Retail Client Acquisition for Equities, F&O, Commodities, Currency Derivatives.
- Explore revenue-enhancing opportunities through IPO, Insurance, and Mutual Funds.
- Solve all the service-related problems of customers and maintain their Portfolio.
- Achieving desired targets with overall responsibility of profits to the clients.
- Explore revenue-enhancing opportunities through implementation & proper business planning.
- Acquisition of Franchises and BDR.

Company: India Infoline Ltd. (IIFL LTD.)

Duration: 21st Feb 2008 – 04th March 2010

Designation: Relationship Manager

Duration: 06th June 2009 – 04th March 2010Key

Responsibility Areas

Sales & Marketing /Business Development

- Opening of New Dmat & Treading accounts of the customer.
- Driving sales initiatives & achieving desired targets with overall responsibility of profits.
- Solve all the service-related problems of customers and maintain their Portfolio.
- Revenue Generation by way of Brokerage
- Cross-selling of Mutual Funds & Insurance Products
- Handling clients and their trading activities and resolving the Queries of clients.

Designation: Marketing Executive

Duration: 21st Feb2008 – 18th October 2008Key

Responsibility Areas

Sales & Marketing

- Opening of New Dmat & Treading accounts of the customer.
- Driving sales initiatives & achieving desired targets.
- Identify and explore new markets and tap profitable business opportunities across all verticals.
- Responsible for Budgets in area, drive sales, demonstrated performance of growth and **lead** sales and distribution planning.
- Deploy Sales & Marketing activity plan for front liners with target setting & reviewing measures.

Education & Certification

- B.Sc. Mathematics.
- NSE's Certification in Financial Markets (NCFM) **Capital Market** (Dealers) Module 54%
- NSE's Certification in Financial Markets (NCFM) **Derivatives Market** (Dealers) Module 68.25%
- NISM-Series-I: **Currency Derivatives** Certification Examination 61.75%
- The Insurance Regulatory And Development Authority (IRDA)

Achievements

- **Qualified Silver Qualification for the insurance contest in Q4 for the FY 2022-23 in YES Bank Ltd.**
- **Qualified for Singapore trip in the insurance contest in Q2 of FY 2022-23 in YES Bank Ltd.**
- **Rank 15th across Pan India ASM in FY 2019-20.**
- **Awarded as Best ASM in FY 2018-19 for Business Achievement in IndusInd Bank Ltd.**
- **Qualified for the insurance contest for the FY 2015-16 and got Recognition from Senior Management in Athens, Greece by YES Bank Ltd.**
- **Qualified for the insurance contest for the FY 2016-17 and got Recognition from Senior Management in Singapore by YES Bank Ltd.**
- **Achieving all Sales targets on a regular basis and qualifying for Monthly Incentives.**

Technical Skill

Operating System : Windows 98, XP & Vista,
Applications : MS Office, MS Excel 2007, ODIN

Personal Profile

Name : Mr. Sagar Ramchandra Patkar
Date of Birth : 11th Feb 1983
Marital Status : Married
Nationality : Indian
Language Known : English, Hindi, Marathi

Declaration

I hereby declare that the information furnished is to the best of my Knowledge.

Date :

Place :

Signature

(Sagar R. Patkar)