SAHANA S
Corporate Sales Manager

Summary

- A Competent professional with 6 years of experience in Channel Management & Team Management. Carries stakeholder management skills and adept at working effectively towards achieving the goals of both the company and self as a cross functional team member and individual contributor.
- Exposure in managing retail and wealth branches and generating business through Bank and Branch channel, Corporate Agent/Channel Partner and Asset Loans (Housing).
- Experience in establishing contacts with HNI base and distributors.

Area Of Expertise

- **Lead generation** –
  - Establish business contacts and networks through references from branch, walk-in clients and engagement activities such cluster banking within corporate.
  - Arrange regular meetings, engaging clients with follow up.
  - Collaboratively work with the internal team, partner and leadership team to develop **lead generation strategies** to generate lead opportunities with prospective customers.
  - Initiating and participating in **new business pitch/ideas** with sales team and subject matter experts.
- **Client Engagement and Conversion –**
  - Foster positive relationships with clients as their **primary point of contact**.
  - Providing expert advisory services to select the right investment plan, Design and execute tailored solutions to client needs, enhancing customer satisfaction metrics by achieving delivery & service quality norms.
  - Seeks opportunity to services to existing clients and get references.
- **Operational Procedures –**
  - **P**roviding consistent, concise, accurate and timely weekly/monthly **sales lead generation activity** reports to management.
  - Worked closely with underwriters to reduce risk and monitoring for all clients.
  - Determined premiums, declarations and coverage to complete a policy.
  - Assessed risk tolerance and risk management to recommend solutions optimally suited to client needs
- **Servicing and engagement -**
  - Answering customer inquiries, managing customer accounts and follows up with them for **understanding client requirement**.
  - Worked closely with operations for troubleshooting any issues for better customer experience.
  - Check regular claims, renewals and provide update on new insurance policies that best suit their needs.
  - Act as a one point of contact for customer to **assist with escalation** in order to achieve 100% customer satisfaction.

Contact

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Core Competencies

- Client Servicing
- Business Development
- Training and Development
- Market Analysis
- Channel Partnering

Academics

- **PGPM** from ICFAI – IBS Business School, Bangalore (2015 – 2017)
- **BCA** from Yuvaraja's College, University of Mysore (2011- 2014)

Languages

- English
- Hindi
- Kannada

- **Stakeholder Management -**
  - Weekly connect and in person meeting with banking partners to provide vision to the leadership that result in exceptional performance of partner, Sales Managers and businesses, and to build communication with **Regional Manager, Circle Head and TPP Head**.
  - Capitalized on new sales and business opportunities when developing relationship with partners, successfully **increasing Market share.**
  - Strategize and develop business plans quarterly for **high revenue conversion** and effective branch operations.

- **Team management -**
  - Performance management of team members, including coaching, recognition, disciplinary action and performance evaluations.
  - Draw up monthly plan of targets, **supporting in stakeholder management** and co-ordinate internally with various functions to ensure efficient **delivery of day to day service requirements**.
  - Ensure each team member has agreed objectives and a performance development plan and regular one to one meeting is held for better understanding of performance and challenges.
  - Monitor the team to ensure everyone achieves the target and identify capacity within the team to manage the workflow in order to meet the target.

Work Experience

- HDFC Life Insurance LTD (Sep'22 – July'23)
  Role/designation: Corporate Sales Manager
- Niva Bupa Health Insurance Pvt LTD (Nov'21 – Sep'22)
  Role/designation: Territory Manager
- Bajaj Allianz Life Insurance Pvt LTD (Jan'20 – Nov'21)
  Role/designation: Area Manager
- Kotak Mahindra Life Insurance Pvt LTD (Dec'18 – Jan'20)
  Role/designation: Senior Manager
- ICICI Prudential Life Insurance LTD. (May'17- Oct'18)
  Role/designation: Sales Manager

Key Achievement

- Managed to complete the product trainings for 157 branches within a duration of 30 days.
- Increment of Market share from 5% to 37% in the duration with 3 months achieving the highest conversion as a new third-party partner.
- Increment Post login conversion from 35% to 70%. (Success rate)