**Pooja Goel *| Assistant Vice President – Quality & Business Excellence***

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**Offering: Business Excellence & Process Optimization| Customer Experience Strategy & Journey Mapping| Lean Six Sigma - Black Belt, TRIZ, Design Thinking| Strategic Planning & Change Management| Data Analytics & Performance Metrics | Stakeholder Engagement & Communication| Program & Project Management**

**Summary**: Dynamic and results-driven leader with over 27 years of diverse experience in Operational Excellence, Business Process Management, Customer Experience, and Financial Operations in the insurance sector. Demonstrated success in managing and transforming a wide range of functions—Corporate Finance, Internal Audits, Facility Management, Procurement, Marketing, Legal & Compliance, and key Distribution (E-commerce) and Non-Distribution (Customer Services, Policy Owner Services, Renewals, CET) channels.

Proven ability to lead quality-centric projects across complex operations, delivering measurable outcomes, enhancing customer and shareholder value, and earning exceptional stakeholder feedback. Skilled in strategic planning, financial compliance, risk mitigation, and cross-functional leadership with a collaborative, data-driven approach to transformation and performance excellence.

**Target Role**: Vice President / AVP – Business Transformation | Customer Experience | Operational Excellence. Seeking a senior leadership role where I can leverage my expertise in Operational Excellence, Customer Experience, and Business Process Management to drive enterprise transformation through Agentic AI, Intelligent Automation (RPA), and data-driven innovation resulting in cost reduction and improved customer experience.

***As Assistant Vice President – Quality Innovation and Service Excellence: Oct 2015 - Continuing***

* Leading end-to-end process diagnostics and re-engineering in a high-volume customer operations environment, enhancing service quality and reducing process cycle times — fully aligned with Business Excellence and SLA-driven delivery models, resulting in a 65% improvement in operational efficiency.
* Designed and implemented customer journey maps, improving customer satisfaction scores by 38%.
* Orchestrated cross-functional teams in the deployment of RPA and chatbot solutions, reducing manual processing time by 50%.
* Enabled profitable growth by translating trends into competitive advantage, ensuring adoption by 80%, and delivering business impact.
* Championed the Quality Culture (QDNA) initiative, leading to a 60% increase in employee engagement and process adherence.
* Developed and delivered SOPs and training manuals across multiple departments, ensuring consistency and a 100% compliance rate.
* Supervising various functions- functions—Corporate- Finance, Internal Audits, Facility Management, Procurement, Marketing, Legal & Compliance, and key Distribution (E-commerce) and Non-Distribution (Customer Services, Policy Owner Services, Renewals, Customer Engagement Team, Facility, Procurement, Products, AI, Information Technology & Marketing - efficiently

***Key Projects & Achievements: -***

* **Reducing POS Decline Percentage (2024)**

**Methodology**: DMADV- RPA | Function: Policy Owner Services

**Outcome**: 42% improvement in POS decline rate

**Impact**: Enhanced customer experience and 25% increase in operational efficiency

**Project Type**: Lean Six Sigma Black Belt

* **Strengthening Persistency – 25M Portfolio (2024)**

**Methodology:** DMAIC | Function: Customer Retention Team

**Outcome:** 3% improvement in policy persistency

**Impact:** Generated ₹12 Crores in business impact

**Project Type:** Lean Six Sigma Black Belt

* **Reducing Unclaimed Balances & Inflow (2024)**

**Methodology:** DMAIC | Function: Policy Owner Services

**Outcome:** 55% reduction in unclaimed balances

**Impact:** Contributed ₹35 Crores in new sales

**Project Type:** Lean Six Sigma Green Belt

* **Peer-to-Peer (P2P) Investment Opportunity (2023)**

**Methodology:** DMADV | Function: Customer Retention Team

**Outcome:** ₹15 Crores in renewal premium collected

**Impact:** Revived ₹100 Crores in sum assured

**Project Type:** Lean Six Sigma Black Belt

* **Up-Sell Process Design (2022)**

**Methodology**: DMADV | Function: E-Commerce Channel

**Outcome:** ₹20 Crores in new business line implemented

**Impact:** Achieved 12% upsell conversion rate

**Project Type:** Lean Six Sigma Black Belt

* **National Award Winner (2022)**
* **Recognition: Winner of the CII RNBQA National Award for Business Excellence**
* **SEM & SEO Conversion Optimization (2021)**

**Methodology:** DMAIC | Function: E-Commerce Channel

**Outcome:** Achieved 10.90% conversion rate

**Impact:** Generated ₹9.4 Crores in additional revenue

**Project Type:** Lean Six Sigma Green Belt

* **Improved PBNA Conversion Rate (2019)**

**Methodology:** DMAIC | Function: Renewals

**Outcome:** 75% allocation of premiums

**Impact:** Allocated ₹20 Crores in premiums

**Project Type:** Lean Six Sigma Green Belt

* **Sangrahan – Branch Optimization (2019)**

**Methodology:** DMADV – Automation | Function: Facility Management

**Outcome:** ₹26 Crores in cost savings

**Impact:** Optimized office space to accommodate a larger workforce

**Project Type:** Lean Six Sigma Yellow Belt

* **Chatbot – Distribution Reporting System (2018)**

**Methodology:** DMADV – RPA & AI | Function: Business Process Management & Analytics

**Outcome:** 62% adoption of the new reporting platform

**Impact:** Enabled real-time data-on-demand capability

**Project Type:** Lean Six Sigma Black Belt

* **Reducing Unclaimed Balances (2017)**

**Methodology:** DMADV | Function: Finance

**Outcome:** 46% reduction in unclaimed amount (₹76 Cr to ₹34 Cr)

**Impact:** 38% reduction in grievances; 6% improvement in CTA scores

**Project Type:** Lean Six Sigma Green Belt

***As Manager – Business Finance: Apr 2009- 2015***

* Collaborated with IT and stakeholders to resolve negative balance cases, improving trial balance accuracy and reducing discrepancies by 25%.
* Led the implementation of corrective and preventive actions in Ingenium, enhancing accounting accuracy and system reliability.
* Ensured end-to-end compliance with IRDA regulations, 64VB guidelines, AML protocols, and financial reporting standards.
* Partnered with IT to resolve high-risk accounting discrepancies and streamline backend financial operations (e.g., PTF, PPF, PDC).
* Led risk assessments, created preventive action frameworks, and supported internal and external audits.
* Oversaw claims and policyholder payouts across India; maintained 100% TAT adherence for core functions like Uchit and Group payouts.
* Developed monthly finance dashboards and KPI trackers for senior leadership and shareholders.

***As Assistant Manager (Customer Services): Jan 2004 - 2009***

* Resolved escalated customer complaints, achieving a 42% reduction in resolution time and enhancing customer retention.
* Developed and standardized complaint resolution templates, improving response consistency and customer satisfaction.
* Mentored a team of 20 executives and 10 vendors, improving performance and consistently achieving team targets.

**Education & Certifications**

* Certified Lean Six Sigma Green Belt – Motorola 2010
* Certified Lean Six Sigma Black Belt –TQMI 2017
* Knowledge woods -Trained on PMP Certification Program 2018
* Innovation through Design Thinking and DFSS – Center for Systematic Innovation 2020
* TRIZ Practitioner – Inventive Skills -2020
* Design Thinking Practitioner – Track TMI- Inspire One 2022

***Pooja Goel***