

# KOMAL KACHOLIYA

## SENIOR CORPORATE AGENCY MANAGER



☎ 9057260422

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📍 Jaipur

### SKILLS

#### ● Technical Skills

Microsoft Office  
Tableau  
Finacle  
CRMNEXT

#### ● NON -Technical Skills

Analytical and critical Thinking  
Financial Advising  
Customer Relationship Management  
Proactive Presenter

### AWARDS

#### 2020-2022:

Award for Persistency Collection by Hdfc Life  
Award for best supporting role for handling REGIONAL MEET by Hdfc Life  
Award for achieving TOPLINE business targets by Hdfc Life

### CERTIFICATIONS

#### 2020-2022:

Certification in Commodities Market  
NSIM Certification in Mutual Fund Foundation  
Certification in Negotiation Skills  
Certification by IDCA in presentation

### OBJECTIVE

Determined Customer Relationship Manager focused on developing strategic business opportunities by delivering exemplary service to each client's individual needs .Organised and successful at managing multiple priorities with a positive attitude. Willingness to take an added responsibilities to meet team goals

### EDUCATION

#### ● INTERNATIONAL SCHOOL OF INFORMATICS AND MANAGEMENT

Finance and Marketing 2018 - 2020

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DIPLOMA IN DATA ANALYTICS 2019 - 2020

### WORK EXPERIENCE

#### ● HDFC Life

Senior Corporate Agency Manager 2020 - Now

Generated new business and referral clients with financial advisors and branch team

Maintained knowledge on banking products to provide optimal service support

Identified prospects need and developed appropriate responses along with suitable information on products and services

Generated quotation for insurance products so that taxation benefits can be taken by the clients

Continuously boosted branch targets and revenue at 90% by consistently meeting all monthly and quarterly goal-sheet

Resolved customer query and provide them solutions for better customer relationship engagement

Handling customer portfolio by giving them investment options offered by bank