

Priyanka Zutshi

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Summary

Results oriented Manager with diverse background in management and customer service. Dedicated to providing excellent Customer service and making operational and procedural improvements. Service Manager with a can do attitude and willingness to help at all times.

Highlights

- Business Planning & Analysis
- New Program Implementation
- Customer Service & CRM Software management
- Training and Development

Accomplishments

- Worked on Miles software and diligently completed all assigned task and helped in delivering the final system.
- Provided required weekly, monthly and quarterly reports listing sales figures and client track record
- Database maintenance so as to provide updated information.
- Assisted in managing the company database and verified, edited and modified members information.
- Co-ordinated, developed, contributed and delivered to the Direct marketing project INSIGNIA

Experience

Manager-Sales Support

09/2006 to 05/2012

ASK Wealth Advisors Pvt. Ltd.

Mumbai

- Created Training manuals targeted at helping financial advisors to use CRM software effectively.
- Accompanying Financial Advisors for signup meetings-Getting all the documents in order.
- Maintain complete understanding of compliance regulations.
- Completing all non online account management functions including address change and other requests.

- Provided reports to clients as and when required
- Provided detailed monthly reports to senior management
- Provided support to Financial Advisors
- Recommended changes to existing methods to increase the accuracy, efficiency and responsiveness of the system.
- Generated and distributed daily reports to appropriate personnel
- Developed, produced and enhanced risk reports for business development
- Maintained confidentiality of company data

Personal Banker

05/2005 to 08/2006

HDFC Bank

Mumbai

- Sourcing prospects and developing new high value customer relationships.
- Responsible for the day-to-day working of branch.
- In charge of all promotional and related activities to create prospect clients.
- Initiate newer business proposition for clients.
- ATM & Demat operations

Floor Manager

03/2004 to 04/2005

Bharti (Airtel)

New Delhi

A. Business Development/ Marketing

- Implementing plans for augmented corporate & institutional sales
- Co- ordination with Retail Sales Executives for generating sales
- Identifying prospective clients, mapping their requirements and designing of proposals and conducting techno-commercial presentations for new business development.
- Participating in Promotional activities like exhibitions, trade fairs, etc

B. Client Servicing

- Cementing relations with clients for ensuring repeat & continued business.
- Providing pre/ post marketing support to the clients.
- Ensuring customer satisfaction by providing technical support, achieving delivery & service norms.

- Monitoring receivables collection from the clients

EDUCATION

Master of Management studies (Marketing)	Mumbai University, India (2003)
Bachelor of Commerce	Jammu University, India (2000)