

MISTY ROY

SENIOR BANKING MANAGEMENT
PROFESSIONAL

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Location Preference:

India

Core Competencies

- Banking Operations
- Customer Relationship Management
- Revenue Generation
- Channel Partner Management
- Banking Compliance
- Relationship Management
- Team Management
- Alliance manager
- Team Building & Leadership
- Business Performance
- Portfolio Management

Education

- PGDM (Marketing) from Balaji Institute of International Business, Pune – 2016
- B. Com from D.D.U. Gorakhpur University, Gorakhpur – 2013



Profile Summary

"Highly-organized & enthusiastic Banking and Customer Operations professional with an experience and high caliber in creating growth of the organization. Proven expertise in the development, organization, and scheduling of various programs with an impeccable track record of success; targeting assignment in Operations across various key sectors. I'm involved in Projects that drives business desire to modernize and move towards strategic directory services platforms"

To associate with an innovative and vibrant organization, this allows me to put my competencies to the best use, to add value to the organization and contributes to my overall growth as an individual.

Looking forward to work in Banking & Customer Experience Industries

- A Complete Manager with expertise in handling business dynamics, developing, nurturing and strengthening teams by deploying evolving management practices and innovative thoughts.
- Customer Focused Wealth Manager** with over 6 years of performance and leadership driven experience in wealth management, personal banking, investment advisory and profitability enhancement.
- Exceptional Professional with extensive expertise in building relationships and driving with alliance team to achieve challenging roles.
- Holds proven capabilities in managing channel partners and activate new business lines, consistently growing business and revenue through extensive knowledge of wealth management as well as setting up verticals, policies, processes and documentation in retail banking, wholesale banking and foreign exchange.
- Identifying areas of development, generating ideas liaison with the partners improve the skills and quality management of the existing staff strength.
- Interacting with the associate trainers for planning new training modules for employees into the organization.
- Spear-headed in working efficiently in tedious work environments, meeting deadlines, and achieving targets.
- In charge of alliance formed between two or more companies to do business and ensuring that alliance is producing profit.
- Able to develop and maintain broad & deep external partner relations with company partners solution areas; partners proposition ,opportunities & markets .

Professional Experience

- May'23 to till date **Indusind Bank as Sr.Banking Partner**
- Since Jun'20 with May'23 **APS Wealth Ventures as Wealth Manager**
- Feb'19 - Feb'20 with ICICI Bank Ltd. as Wealth Manager
- May'17 - Jan'19 with HDFC Bank Limited as Deputy Manager
- Feb'16 - Apr'17 with Godrej Consumer Products Ltd. as Sales Trainee

Role:

- Deft in maintaining relationship with existing clients and increasing the book size thereby ensuring to meet revenue targets monthly.
- Instrumental in giving customized services to clients by managing their portfolios, opening their De-mat and trading account thereby generating business from them
- Ensuring Sales across Liabilities, Retail Assets, Business Banking, Forex, Credit Cards, and online trading etc. and achieving the targets

Notable Accomplishments

In Godrej Consumer Products Ltd.

- Learnt overall Consumer Products for group.
- Handled S&D metrics for products of GCPL.
- Managed Distributor point as well as DSR.
- Focused into working parameters like lines billed, productivity and active outlets against previous month.
- Ensured maximum Green Zone day.
- Improved Sales forecast among the DSR in order to achieve the monthly sales target.

Internship Undertaken

Godrej & Boyce Manufacturing Company Ltd. (MBA: May 2015 – Jun 2015)

"Customer awareness and client generation in Godrej Tea/Coffee Vending Machine Business."

- Managed the direct requirements of vending machine and future moves in Tea/Coffee material of Godrej
- Analyzed the current scenario in the market for this product
- Recommended product to dealers
- Conducted demonstration for one day and collection of feedback
- Lead Generations

Key Accolades

- Generated 25lakhs of life insurance business in one quarter
- Achieved 2nd rank in Pune VRM channel in HDFC Ergo product
- On-boarded third party product tie up with organisations.
- Closed 2 PMS product in a single month

- Promoted numerous financial services in order to maximize the revenue, developing and maintaining channel partners, clients and all stakeholders for continuous business inflows.
- Monitoring quality sales and services for HNI portfolio
- Diligent in managing the HNW customer as per the given portfolio from bank and indulged in regular interaction with customer & proactively assessing customer needs through dedicated services.
- Focusing on the collaborative work of the alliance-bridging partnering organizations and independent function
- Worked with external stakeholders to understand and investigate feedback into the service, function or product provided.
- Continuous partner engagement with the portfolio customers mapped as per the contact policy, with accurate & complete capture of interaction details.
- Cross selling of various products ensuring a chain communication between all the parties or partner,
- Monitoring large amount movements & ensuring timely submission of customer base review to team managers.
- Ensure plans are made and processes are created to evaluate the impact of the changes made, including taking responsibility for overseeing and reporting on this evaluation.
- Generates the highest income basically on three parameters which are contractibility, auto loan disbursement & digital 2.0

Certifications

- NISM (National Institute of Securities Market) Series VA Mutual Fund Distributors Certification.
- IRDA – Insurance Regulatory & Development Authority of India.

Technical Skills

MS Office (PowerPoint, Excel, Word)
Internet savvy

Personal Details

- **Gender:** Female
- **Nationality:** Indian
- **Languages Known:** English & Hindi