

Mehul Sharadbhai Sonawane

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Summary

A Seasoned Sales Professional with Proven Record of Taking Most Challenging Roles and deliver Turnaround Performance. Having 6 Years of experience in field sales, seeking a management position. Seeking an opportunity to apply my advanced knowledge of sales, customer service and my experience with Life Insurance, Corporate Salary, virtual relationship management, Branch banking, and having expertise in Banking and Insurance Products knowledge, Portfolio management, Customer service, Team Management, Wallet Share, New Product Launch, Sales Management, Training, Staff Development.

Experience

RELATIONSHIP MANAGER | Unity Small Finance Bank | APR 24 – NOV 24

- Handling Branch's portfolio book size by providing services and fulfilling bank requirements
- Working towards deepening and strengthening the portfolio with NTB acquisition
- Maintaining a deep knowledge of Banking products and services
- Building and maintaining strong relationships with prospective and existing costumers
- Visit and acquire new customers, Entity, TASC's account through visits and appointments
- Identifying clients' need and requirements and proposing suitable solutions
- Handling Branch customers Re KYC, services parameters, and through following compliance
- Providing clients with comprehensive product/service consultations and guiding their decision-making process
- Dealing with Co-Op credit society and Banks for Bulk Deposits

BRANCH RELATIONSSHIP MANAGER (CHIEF MANAGER) | INDUSIND BANK | SEPT 23– APR 24

- Handling Branch's portfolio book size by providing services and fulfilling bank requirements
- Working towards deepening and strengthening the portfolio with NTB acquisition
- Maintaining a deep knowledge of Banking products and services
- Building and maintaining strong relationships with prospective and existing costumers
- Cross-selling bank products & building penetration for remote banking channels like net/mobile banking
- Identifying clients' need and requirements and proposing suitable solutions
- Providing clients with comprehensive product/service consultations and guiding their decision-making process
- Resolving complaints and issues efficiently and in a timely manner
- Meeting sales/revenue targets
- Ensuring Customer Satisfaction

PREFERRED RELATIONSHIP MANAGER (VRM) | HDFC BANK | OCT 21 – AUG 23

- Developing and expanding existing High Net Worth Customer relationships for liabilities
- Deepening relationships sourcing family accounts
- Work Quickly to address and resolve customer issues
- Cross-selling bank products & building penetration for remote banking channels like net/mobile banking
- Informing customers of new products or product enhancements to further expand the banking relationship
- Maintaining complete relationship record for assigned customer accounts
- Ensuring high levels of customer service orientation to meet benchmark NPS
- Collaborating with the field sales teams to ensure lower cycle times and best conversion ratios

DEPUTY MANAGER | KOTAK MAHINDRA BANK | NOV 19 – OCT 21

- Handling associated Corporate with Bank
- Opening Salary Accounts of assigned Corporate
- Conducting induction for new employees about salary accounts and banking products
- Building Relationship with HR and Employees of corporate
- Co-ordinate and handle Executives of various bank products
- Provide end to end service to bank customers

ASSOCIATE FINANCIAL SERVICE CONSULTANT | ICICI PRUDENTIAL LIFE INSURANCE | JAN 18 – NOV 19

- Teaming up with Bank Staff to achieve Sales Target
- Cross selling life insurance products to waling customers in bank
- Building relationship with UM's to achieve targets
- Conducting regular training for the UM's and Advisors of Partner Offices
- Converting Leads provided by Advisors
- Providing end to end Service to the Client

Education

- B. Com (North Maharashtra University)
- MBA (Savitribai Phule University)

Certifications

- IRDA – IC38 – Certificate exam of corporate agents (SP Composite)
- NISM Series 5-A: Mutual Fund Distributors Certification Examination

Personal Details

- DOB: 20-06-1994
- Marital Status: Married
- Strength: Optimistic, Integrity, Patient
- Languages: English, Hindi, Marathi, Gujarati