

### **Career Objective**

Intend to build a career with an organization which will help me to explore myself to my potential. Also willing to work as a key player in a challenging and creative environment.

### **Summary**

A Certified Professional with demonstrated success in the management and delivery of Quality Customer Service with strong people support. **Over 10years of extensive experience working with TPA and 8 years in broking.** A track record of building teams with improved productivity/process and meeting critical requirements consistently.

### **Areas of expertise**

Customer Operations, People Management, Training, Internal Client Relationship, Team Building, EB Placements.

### **Professional Synopsis**

#### **Optima Insurance Brokers Pvt Ltd**

*1<sup>st</sup> Feb '2016 till date*

#### **Assistant Manager – CRM (Customer Relation Management) Responsibilities**

- Handling complete EB portfolio in Bangalore Branch.
- Preparing GMC, GPA & GTLI RFQs, floating it to the insurers.
- Following up for the quotes, negotiating on the premium and coverage with the insurers.
- Preparing comparison on the quotes received from various insurers.
- Preparing the placement slip once the business is booked.
- On receipt of the policy, follow up for the data upload, issuance of e-cards / physical cards.
- Arranging the orientation programme, to give the information about policy coverage to the client.
- Monthly review meeting with the client and respect to any issue in the issuance of cards, cashless, claims and for the settlement.
- Co-ordinating with client month on month basis for collecting the employee details for addition & deletions.
- Preparing the endorsement calculation towards additions & deletions and following up for the same.
- Visiting the Insurance Company for the pending policies / endorsements / claims.
- Co-ordinating with the insurers for the special approvals / confirmation in case of any cashless/ approval to re-open the claims & arranging approval for buffer claims / cashless.
- Attending the query mails and calls of the insured and insurer.
- Any grievances and escalations will be handled smoothly with the support of the management and resolve the issue.
- Continuous follow ups for the pending cases / issues with the internal team for the closure.
- Sharing the monthly MIS to the client. Work on the pending claims for further process / settlement.

- Preparing monthly business report and updating in the SAIBA (Software).
- Arranging the quotes for retail health, PA & Term Life policies, preparing comparison and arrange for the policy, physical cards.
- And was also handling Non-EB policies. Following up on quotes and policies after placing.
- QC will be done comparing the placement slip and sharing it to the client.
- Following up with insurers in case of any corrections in the policy.

## **Paramount Health Services TPA Pvt Ltd**

*21<sup>st</sup> April '2014 to 29<sup>th</sup> Jan '2016*

### **Senior Executive – CRM(Customer Relation Management) Responsibilities**

- On receipt of the policy, follow up for the data upload, issuance of e-cards / physical cards.
- Arranging the orientation programme, to give the information about policy coverage to the client.
- Monthly review meeting with the client and broker, respect to any issue in the issuance of cards, cashless, claims and for the settlement.
- Visiting the Insurance Company regularly for the collection of endorsement / policy, co-ordinating for the any clarification in policy.
- Co-ordinating with the insurer for the special approvals / confirmation in case of any cashless and approval to re-open the claims.
- Submission of Invoice and debit notes to the insurance company and follow up for the payments.
- Attending the query mails and calls of the insured, broker and insurer.
- Any grievances and escalations will be handled smoothly with the support of the management and resolve the issue.
- Internally co-ordinating with our team for the cashless / claim process.
- Maintaining the good relationship with the insurer, insured and with the intermediaries.
- Continuous follow ups for the pending cases / issues with the internal team for the closure.
- Sharing the monthly MIS to the broker, insurer and the client. Work on the pending claims for further process / settlement.

## **Raksha TPA Pvt Ltd Team Lead**

*07<sup>th</sup> July' 2007 to 9<sup>th</sup> May'2013*

### **Responsibilities**

- Joined as executive and after a year promoted as senior executive with additional task, handling the Call Centre, Front Office & Cashless Team.
- Co-ordinating with the hospitals regarding the cashless, and their outstanding with Raksha TPA.
- Co-ordinating with the Insurance Company for the previous policy history and if any clarifications in the processing the cashless or for re-imbursement claims.
- Handling the customers in case of any grievance in the front office.
- Preparing cashless report on daily basis and sending it to the concern insurance companies.
- Co-ordinating with hospitals for the new empanelment of the hospitals.
- Preparing monthly Grievance Report pertaining to claims and cashless (Legal Cases, Regional office, Development Office, Branch Office grievances).
- Replying mails received at CRCM .
- Co-ordinating with the corporate and broking for the claim analysis.
- Preparing rosters for the team.
- Responsible in hiring new candidates.

- Giving training to the new candidates.

**Medi Assist India Pvt Ltd**  
**Executive in Call Centre**

*16<sup>th</sup> May'2006 – 14<sup>th</sup> June'2007*

### **Responsibilities**

- Attending calls and responding to the queries of the callers.
- Giving the exact information about the insurance coverage to the callers.
- Updating the status of the cashless, claims and settlement.
- Calls were answered more than 150 per day and updating it in the records.
- If any delay in processing the cashless / reimbursement, raising NC against the concern department to clear the case on priority.
- Co-ordinating with the internal team for the processing the cashless / reimbursement claims.

### **Education Qualification**

B Com – C V Raman University - Bilaspur  
PUC – Mitralaya Pre-university College, Bangalore  
S.S.L.C – St. Theresa's Girls High School, Bangalore

### **Professional Qualification**

Perusing Licentiate – III

### **Software Skills**

Operating system : DOS, MS Windows  
Packages : MS office  
Excel : Pivot Table, V Lookup

### **Personal Information**

Marital Status : Married  
Gender : Female  
Date of Birth : 15/11/1987  
Nationality : Indian  
Present address : Grand Gandharva Apartments,  
Flat No – E-109, No. 40/1A, 2<sup>nd</sup> Main, 2<sup>nd</sup> Cross  
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Bangalore  
Date:

Mary Jacqueline S