



Praveen Barve

Life Insurance L&D and
Sales professional

My Contact

✉ praveen.barve@gmail.com

☎ +91 9021154076

📍 101 / M4 Nakshatram,
Chinchwad Pune. 411033

Hard Skill

- Business & Financial need analysis and customized solutions
- Provide customized training solution
- Imparting need base training solution for business development
- Instrumental in surrender and customer retention

Soft Skill

- Observation
- Decision making
- Communication
- Multi-tasking

Education & Certifications

- III Compliance, Governance and Risk Management – 2024
- Udemy – The complete instructional designer course 2024
- NISM – Retirement Adviser Certification 2023
- Associate in Life Insurance from Insurance Institute of India – 2020
- III Certificate Programme in Advance Insurance Marketing (CPAIM) – 2019
- NISM – Investment Advisor Level 2 – 2018
- NSE Certified Market Professional (NCMP) – Level 2 – 2018
- NISM (National Institute of Stock Market) – Investment Advisor Level 1 – 2016
- NCFM – Investment Analysis and Portfolio Management Module 2014
- Licentiate in Life Insurance from Insurance Institute of India – 2011
- MBA in Marketing Pune University. 2005

About Me

Dedicated and detail-oriented Insurance L&D and sales professional with 19 years of experience. Closely worked with Sales and Operations team for procurement of new individual business and group insurance business, handling customer queries, proposal creation & documentation as per underwriting guidelines. Adapt at Distributor and Employee Training, SBI Bank staff segmented Training, Induction Program, Domain, Product and Sales Training. Special interest in advising on retirement and personal financial planning.

Professional Experience

SBI Life Insurance Co. Ltd | Sr. L&D Manager 2012 – Present

Key responsibilities:

- Analyze training needs of internal and external distributors
- Look after Training of SBI Bank staff of Pune Zone, SBI Life Branch locations of Agency, corporate brokers and alternate channel.
- Involved with Sales team for conducting insurance and investment awareness program and closing Business Insurance (EEI, Keyman, HUF, MWP and Group Insurance).
- Responsible for adoption and consumption of various digital apps of employees and distributors.
- Prepare reports on the above information and communicate the insights of these reports to the broader business
- Content development as per the various training needs.
- An effective communicator with exceptional analytical, technical and negotiation skills with the ability to relate to people at any level of business and management.

Reliance Life Insurance Co. Ltd | Sales Training Manager 2008 –2012

Key responsibilities:

- Looked after Training of employees and distributors of agency channel.
- Worked with Sales and Operations team for renewal collection campaign to maintain business persistence.
- Involved with Sales team for conducting insurance and investment awareness program

Bharti-AXA Life Insurance | Sales Manager (DSF) 2007 – 2008

Reliance Life Insurance | Sales Manager (Agency) 2006 – 2007

ICICI Prudential Life Insurance | Consultant Trainer 2004 – 2006

Achievements

- Core member of “ Regional Induction Champ Team”
- Grade Promotion in the Year 2022
- Received appreciation for extraordinary training support for business development by DGM SBI Bank in 2021 – 22 & 2022–23
- Winner of Lakshya 2 Regional Contest (renewal Premium collection) in March 2019
- Winner of Jabardast Jan Feb 2019 L&D contest and qualified for Cruise Trip. (2019)
- Awarded as “Global Content Champion” in National L&D Meet 2019
- Selected as a member of Global Content Team 2018