

Shivakumar S M

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OBJECTIVE

Intend to build a career with leading corporate which will help me to explore myself fully and realize my Potential. Willing to work as a key player in Challenging & Creative Environment, Result-oriented professional targeting assignments in Retail, Direct Sales, Operation and Distribution Management in an organization of high repute.

- Over 17+ years of rich experience in Sales & Marketing, Operation, Customer Support , Business Development & Key Account Management with various organizations.
- Exceptional communication & presentation skills with demonstrated abilities in training & team building.
- Adept at identifying and developing key Market Segments for business excellence and accomplishment of targets.
- Proficient in fine-tuning strategies to ensure wider market reach & penetration of unexplored markets.
- Executed the strategy & plans for the organization's business operations; drove operations that led to an increase in turnover & profitability.
- Known for augmenting growth, generating new business and devising & executing business plans by leveraging comprehensive understanding of the dynamics of the industry.
- Highly skilled Financials services, Life Insurance , Financial Marketing and Customer Service.

EXPERIENCE

JUL' 07 - DEC' 07

FRANKFINN INSTITUTE OF AIRHOSTESS TRAINING

Management Trainee

- Scheduling seminars in schools and colleges.
- Taking care of marketing activities.
- Generating database by executing the marketing activities.

JAN'08 - AUG'12

ING LIFE INSURANCE CO LTD

Sr Executive (Operations)

- Handling Asset Operations, branch level complete HR process, banking transactions- Deposition of Cheques, daily cash transactions and reconciliation of accounts.
- Attending customer queries, processing pos requests & Following up with customer for renewals.
- Processing of proposals as per UW guidelines & Interaction with Underwriter for follow-ups on Issuance, Maintaining Daily & Monthly MIS.
- Ensuring strict adherence to the data protection policy across the process & compliance of statutory requirements as per audit guidelines.

OCT' 12 - NOV' 13

BHARTI AIRTEL LTD

FTA Spoke Manager

- Managing a team of 4, for the quality check, data entry etc of post paid & prepaid sim activation.
- Training the sales force, retailers and distributors about the guidelines, recent changes in the process.

DEC' 13 - JUL'15

GREEN ORGANICS

Administrator

- Maintaining all reports and files as per audit, preparing monthly / annual sales report.
- Participating in Marketing activities along with the sales force
- Monitoring the packaging & material management.

SEPT' 15 – JAN' 19 MAX LIFE INSURANCE CO LTD

Service Delivery Executive (Operations)

- Handling Branch administration, Branch Facility, HR complete process of new joiners and operations of different channels.
- Complete processing of NB Issuance follow-up, Processing of POS, renewal follow-up, Claim settlements and conducting the training sessions on UW, verifying documents, processes, new guidelines to the sales force.
- Generating leads from walk-in customer for recruitment / new business and cross selling of insurance products.
- Ensuring strict adherence to the data protection policy across the process & compliance of statutory requirements as per audit guidelines
- Attending the customer queries, resolving them through quick kill or non quick kill, so that the customer is delighted with the service.
- Helping the sales force through active participation in marketing activities to enhance the branch business.
- Handling banking transactions- Deposition of Cheques, daily cash transactions and reconciliation of accounts.

JAN' 19 – FEB' 20 TATA AIA LIFE INSURANCE CO LTD.

Branch Operation Executive (Operations)

- Handling Branch administration, Branch Facility, HR complete process of new joiners and operations of different channels.
- Complete processing of NB offline cases (verifying documents along with the underwriting guidelines) & Issuance follow-up across all channels, Processing of POS, Renewal follow-up, Claim settlements and Generating business leads.
- Ensuring strict adherence to the data protection policy across the process & complainant of statutory requirements as per audit guidelines. Generating leads from walk-in customer for recruitment / new business and cross selling of insurance products
- Attending the customer queries, resolving them through quick kill or non quick kill, so that the customer is delighted with the service.
- Converting the existing and walk-in customer for NACH registration, Portal Activation and educating online self services.
- Conducting Training sessions on UW, process to the distributors, agents and other channel partners.
- Handling banking transactions- Deposition of Cheques, daily cash transactions and reconciliation of accounts.
- Handling complete process of Agents pre and post recruitment services.
- Conducting HR activities at the branch, with co-ordination of regional HR.

SEP' 20 – JUN' 22 TURTLEMINT INSURANCE BROKING LTD

Digital Leader (Freelancer)

- Recruiting DP, training & attending the joint calls with them
- Supporting the team and resolving the queries.
- Followup with the customer and the insurer for Issuance.
- Conducting different Marketing activities for recruitment.

JUL' 22 – DEC' 22 PNB METLIFE INSURANCE CO LTD

Chief Business Manager (Sales)

- Responsible for recruitment and management of Life Insurance Managers & Distribution Manager- Identify, recruit, train and manage.
- Train and motivate to LIM & DM, supporting them in recruitment activity, provide a better understanding of market/products.
- Monitor and review LIM & DM performance. Help them to achieve maximum business.
- Meeting existing customers on a regular basis for achieving service standards.

- Execution of sales strategy – Increase market reach and penetration through market segmentation.
- Seek new customers and increase sales.
- Conducting different Market activities for building team.

JAN' 23 – NOV' 23

BHARTI AXA LIFE INSURANCE CO LTD

Associate Area Manager – ROK (Sales)

- Responsible for business target achievement of team by driving sale of life insurance Products & Persistency through different partners; team size of 5 Relationship Managers.
- Driving the channel partners to sales insurance products. Responsible for overall development and management of the branches.
- Forecasting monthly/annual sales targets & executing them in given time frame by organizational planning.
- Conducting training sessions to the partners (DO & SO) about the products and new updates
- Monitor and review UM & Sr UM performance. Help them to achieve maximum business.
- Helping partners with the Post & pre customer services, marketing activities etc
- Managing complete business operations with accountability for profitability. Driving mile share with brokers at their Respective location.

JAN' 24 – Till date

SHRIRAM LIFE INSURANCE CO LTD

Branch Manager

- Responsible for business target achievement of team by driving sale of life insurance Products & Persistency team size of 5 Unit Managers.
- Train and motivating UM & Sr UM, supporting them in recruitment activity, provide a better understanding of market/products.
- Forecasting monthly/annual sales targets & executing them in given time frame by organizational planning.
- Conducting training sessions to the partners (DO) about the products and new updates
- Execution of sales strategy – Increase market reach and penetration through market segmentation.
- Conducting different Market activities for building team
- Managing complete business operations with accountability for profitability. Driving mile share with brokers at their Respective location.

ACHIEVEMENTS & AWARDS

- Ψ Awarded “Certificate of Excellence” for renewal Collection in the month of JFM 2010.
- Ψ Awarded “Well Done Award” for Excellent Branch Management with Minimum Audit findings.
- Ψ Awarded “Well Done Award” For Having good control on Av. ORM and 0% error in Docket.
- Ψ Awarded for Minimum discrepancy in documents processing, in the month of JFM 2016.
- Ψ Audit rating 2 for the branch operations for FY 16-17 & rating 1 for the branch operations for FY 18-19.
- Ψ YOY growth of 200% in S2R & S2S for the FY 17-18.
- Ψ Achieved 150% of JFM (2023) target
- Ψ Qualified for the Dubai contest June'24

EDUCATION

- Master's in Marketing (MIM) -2007
Karnataka University
- B.SC in Electronics-2005
Karnataka University

PERSONAL DETAILS

- **Date of Birth** : 03/07/1984
- **Marital Status** : Married
- **Nationality** : INDIAN
- **Languages** : Kannada, Hindi & English
- **Gender** : Male
- **Address** : "SrideviNilaya" Plot No 62, Atmanand Layout,
Near Tapovana, Dharwad – 580003.

Declaration:

I hereby declare that the above written particulars are true to the best of my knowledge and belief.

DATE

PLACE