

# Yogendra Jaiswal

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## **CAREER OBJECTIVE**

Seeking a challenging opportunity to work with commendable organization that offers me an opportunity to enhance my skills and knowledge for the betterment of self and organization.

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## **CORE COMPETENCIES**

Customer Service  
Detailed and Organized

Cost Efficient  
Supplier Relationship

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## **PROFESSIONAL EXPERIENCE**

### **PRUDENT INSURANCE BROKERS PVT LTD**

Assistant Manager, June 2023 till date

- Working in claims department, handling major clients in total handling premium of approximately 60 crores
- Taking review with TPA on outstanding claims, auditing the claims processed by TPA, Presenting claim MIS and summary report of claims to client.
- Preparing report for outstanding claims on weekly basis.
- Following up with insurer for getting necessary approvals.
- Ensured high-quality customer experience, elevated customer satisfaction, while adhering to SLAs, TAT and work processes

### **POLICYBAZAR INSURANCE BROKER PVT LTD**

Assistant Manager, Nov 2022 to June 2023

- Handle Medical Help Desk at client place-NSDL
- Preparing the Monthly reports - Negotiation Reports, Insurance company Network list report (Public and Private insurance company wise), Claim Tracker, Query Tracker, Active employee data.
- Prepare MIS Data for the Bank Details required.
- Co-ordinated with hospital for documentation by email.
- Verification hospital documents and follow up with remaining documents.
- Co-ordination with Other Department for the relevant queries and issues (Cashless Team, CRM Team, Account Team, Claim Team, Inward Team, Filing Team).
- Co-ordination with HR for the claims query and dependent data.
- Coordinating with employee for the reimbursement claims and status with query reply and all document verification, which is, provide to Employee and HR.
- Every Weekly and monthly share MIS and Outstanding data to HR and Broker.
- Co-ordinate with insurance company for issuance of Policy as well every month endorsements.
- Co-ordinate with respective HR as well insurance company for their claim payment as well CD Balance

- Monthly visit to insurance company for claim, payment and endorsement related queries and resolve the same.
- Co-ordinate with TPA Regarding the employee claim, hospitalization.
- Data uploading for Employee E-cards in the portal.

#### **MEDI ASSIST INSURANCE TPA PVT LTD.**

Assistant Manager, 1st July 2022 to Oct 2022

- Client Renewal and Retention : Have been retaining Client by providing good services and try to improve it on daily basis
- Meetings with Broker and Client HR's Periodically to understand their requirements and mold accordingly to work up to their satisfaction.
- Regular Insurer Visits to maintain the relationships and get the cases move which are stuck for endorsements, approvals, or error log.
- Preparing MIS Outstanding reports to have clear idea on the cases so that follow up can be done with the concerned stake holders.
- Handling of Corporate medical claims.
- Coordinating with Insurer with regards to the concurrence for the denied and delayed claims.
- Coordinating with client Admin Hr for recommended special case.
- Attending Helpdesk for swift client Service and understanding their requirements.
- Coordinating with Client HR officials for claim related requirements and ensuring claim are settled within SLA.
- Verifying documents submitted by client. In case of any shortfall, informing them via telephone, email or in person.
- Replying to client queries.
- Coordinating with Medical Officers to ensure that the claims are settled as per IRDA guidelines and policy terms & conditions.
- Sending monthly MIS reports to client HR with current status of their claims.
- Providing policy related information such as co-pay, capping on ailments, Pre & post hospitalization etc.
- Handling 1<sup>st</sup> as well as 2<sup>nd</sup> level escalations.
- Mentoring new trainees and grooming them for the claims and CRM roll.

#### **MEDI ASSIST INSURANCE TPA PVT LTD.**

Executive CRM, 10<sup>th</sup> Oct 2016 to June 2021 (Promoted as Team Leader on 1<sup>st</sup> June 2021)

- Handling of Corporate medical claims.
- Coordinating with Insurer with regards to the concurrence for the denied and delayed claims.
- Coordinating with client Admin Hr for recommended special case.
- Attending Helpdesk for swift client Service and understanding their requirements.
- Coordinating with Client HR officials for claim related requirements and ensuring claim are settled within SLA.
- Verifying documents submitted by client. In case of any shortfall, informing them via telephone, email or in person.
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- Sending monthly MIS reports to client HR with current status of their claims.
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- Mentoring new trainees and grooming them for the claims and CRM roll.

## **NIHAL CONSTRUCTIONS**

Sales & CRM, Sept 2014 to Sept 2016.

- Setting up the monthly targets for the Sales Collections.
- Co-ordination with sales and marketing departments for the generation of new leads.
- Planning and Designing Marketing Events: Broker Meet; Exhibitions .
- Co-ordination with vendors/site engineers for completion and correcting the snags of units due for hand over to client.
- Training and motivating staff to bring in new ideas amongst the team to create smooth and cohesive functioning of the team resulting to higher client satisfaction and servicing.
- Planning, execution and following up on customer retention campaigns through a variety of media, including text, mail, email and telemarketing.
- Working with customer service, marketing staff and operations to maintain a customer-focused attitude with a focus on activities that create lifetime customers.
- Responsible for Government liaising and approvals for bank financing in relation to the project
- Responsible for Accounts Reports, Monthly Reconciliation, Maintaining Monthly MIS of project for sales and collections.
- Managing team and supervising them for their performance.

## **BETTER OPTIONZ**

Proprietor, June 2009 to August 2014

Better Optionz is one of the finest coach operator and corporate transport service provider in transportation industry. We are recognized for punctuality and at the same time for best Quality travel services. We provide AC & Non AC vehicles on contract hiring basis as well as on call basis to various government & corporate sectors with undisputed services. We are also associated with sub-contractors all over Maharashtra/Goa/Gujarat in travel industry so as to enhance our network effectively & efficiently.

## **POLLUTION PROTECTION SYSTEMS MUMBAI**

Sr. Sales Engineer, May 2007 to May 2009

- Resolve customer complaints regarding sales and service.
- Plan and direct staffing, training, and performance evaluations to develop and control sales and service programs.
- Determine price schedules and discount rates.
- Review operational records and reports to project sales and determine profitability.
- Monitor customer preferences to determine focus of sales efforts.
- Prepare budgets and approve budget expenditures.
- Confer or consult with department heads to plan advertising services and to secure information on equipment and customer specifications.
- Direct and coordinate activities involving sales of manufactured products, services or other subjects of sale.
- Confer with potential customers regarding equipment needs and advise customers on types of equipment to purchase.
- Advise dealers and distributors on policies and operating procedures to ensure functional effectiveness of business.
- Visit franchised dealers to stimulate interest in establishment or expansion of leasing programs.
- Direct clerical staff to keep records of sales correspondence, bid requests, and credit collections, and to maintain current information on tariffs, licenses, and restrictions.
- Represent company at trade association meetings to promote products.

## **CYBERTECH SYSTEMS AND SOFTWARE LTD., THANE**

Global Support Executive, December 2005 to April 2007

- As a Global Support Executive my Primary responsibility is to Support clients for SAP, GIS Helpdesk.
  - Making conference between offshore consultants and clients.
  - Assigning Tickets to the consultants by judging its Module.
  - Monitoring the Cyber help and the reporting the errors, if any, to the concerned team.
  - Taking care of the helpdesk and see to it that all the equipment is working fine.
  - Monitoring the Weekly and monthly Reports of the projects.
  - Maintaining Call Tracker to keep call records.
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## **EDUCATION**

IIITBM Bachelor of Commerce Degree in 2013.

MAHARASHTRA STATE BOARD Senior Secondary Certificate in 1995

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## **ADDITIONAL SKILLS**

- Dipl. In MS-Office (Word, Excel, PowerPoint) from CMS Institute, Thane
  - Certified Course in Computer Hardware, Networking & Multimedia from Global InfoTech, Thane
  - Languages Known – Hindi, Marathi and English
  - Cadet of Civil Defense, completed Basic, First Aid, etc. courses
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Date :

Place : Mumbai