



## SHAKTI SHARAN

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### Assignments in Customer Relationship Management with a leading organisation

#### Career Outline

**Insightful experience of nearly 11 years** in the areas of Business Development Operations Management, Customer Service, Process Management.

- ⊙ *The wealth of expertise comes from working across **nearly 5 yrs in middle management and almost 6 years in Life Insurance industry.***
- ⊙ Adept at managing and leading teams for running various aspects of Business Development, Operations, Service functions including Branch Operations.
- ⊙ Proven track record of managing processes/streamlining workflow and supporting in team work environment to enhance productivity innovatively.
- ⊙ Excellent communication, inter personal and relationship management skills.

#### Areas of Expertise

**Business Development & Branch Operations ~ Process Management ~ Performance Management**

##### Business Development

Key role for generating revenue for the branch by procuring New Business

##### Operations Management

- ⊙ Setting and maintaining CTQ (Critical to Quality) & CTP (Critical to Process) controls.

#### Career Contour

**Oct' 07 till date with ICICI prudential Life Insurance Company Limited, Bihar Sharif Bihar in Branch Sales and Customer Service Operations**

##### **Major Assignments Handled:**

**Branch In charge (Branch Sales and Customer Service Operations) -Since 1<sup>st</sup> May'2013 till date, with ICICI Prudential Life Insurance Co. Ltd. Bihar Sharif Branch Bihar.**

##### **Role: Branch Level**

##### **New Business (underwriting) facilitation & Risk Management**

- ⊙ Implementing New Business guidelines, workflow, application forms and questionnaires; monitoring the process to ensure operational efficiency in the best interests of the company. Reviewing & Upgrading them from time to time.
- ⊙ Ensuring implementation and adherence of product policies; handling vendor management functions for scanning, data entry, policy printing & dispatch. Monitoring quality & other SLAs. Involved in TPA management.
- ⊙ Devising risk policies, managing risks and implementing effective mechanisms to mitigate them.

##### **Customer Relationship Management**

- ⊙ Handling customers, identifying improvement areas and implementing measures to maximize customer satisfaction levels.

- ⊙ Encouraging continuous interaction with the customer to make sure that any area of concern can be worked upon for improved service levels.
- ⊙ Setting out quality standards for various operational areas, ensuring a high-quality customer experience while adhering to work processes.

### **Process Management**

- ⊙ Analyzing the existing operations process and developing operating Risk Control monitoring matrix in conjunction with the business units.
- ⊙ Monitoring overall functioning of processes, identifying improvement areas and implementing measures to maximize customer satisfaction level; responsible for quality Branch Audits/compliance with respect to all processes & guidelines.
- ⊙ Conducting internal process audits & process reviews for ensuring strict adherence to the process parameters/systems as per defined guidelines.

**As Branch Relationship Manager- Since June'2012 till 30 April 2013. As Branch Relationship Manager-Since June'2012 till date ( Company has started a new concept at sixty branches Pan India as pilot project for generating revenue by procuring New Business by the Branch operations .I have been selected for this pilot project for Gaya branch.**

### **Role:(Cluster Level)**

#### **Customer Relationship Management**

- ⊙ Key role for generating revenue for the branch by procuring New Business
- ⊙ **Results-oriented and committed to success and accustomed to maintaining Strong client relationships increasing Customer satisfaction & providing Quality service.**

**As Customer Service Executive - Operations, Hub Branch -Gaya till Oct' 08**

**Since Oct' 07**

**As Customer Service Associate – Since oct'08 till May 2012**

### **Role: (Cluster Level)**

- ⊙ Responsible for setting up service culture across hub branch and two of its spoke branch.
- ⊙ Customer Service/Complaints, HNI Operations, Claims, Persistency
- ⊙ Enabling process improvements with a "Customer First" Approach.
- ⊙ Interacting and handling quires of internal and external customers.
- ⊙ Doctors Management
- ⊙ Policy servicing
- ⊙ Adviser servicing
- ⊙ Claims
- ⊙ Customer Retention
- ⊙ Sourcing Business

### **Additional Charge: Branch Audit (Internal)**

I have been given an added responsibility of doing branch level internal audit of all departments, be it DOPS, Service or Cashiering.

I am also looking after and coordinating with the spoke branches of Biharsharif, Dehri-on-sonne and location as Aurangabad Nawada, Sasaram, Jehanabad which comes under the Gaya Hub Branch for policy servicing (Internal and External customer) and claims.

### **Attainments**

- ⊙ **Recognized by the "Head of Operations State for the efforts & enhancing the Customer Satisfaction level** across Hub branch and its spoke branch by company vision "Customer first and boundryless approach"
- ⊙ Efficiently handled escalations from Ombudsman, MD's desk / Legal & Compliance desk .
- ⊙ Overachieved targets for consecutive two years since the inception of the concept i.e service to sales where we have to generate leads from walk-in customers and subsequently converting them to business. Now this is core functioning of our profile. I was ranked best employee pan India (Ranked 3<sup>rd</sup> out of ten top employee)in the year 2010 for S2S concept.

- ⊙ Service is a very important department of any service sector. The onus of retaining the customer lies with the person who sits here and is the face of the company. Being here for around four years I have taken tough challenges and sorted out many complicated cases. I have received letters of appreciation from those customers also who had come to office with loads of grievances but have returned satisfied. This has been biggest achievement.
- ⊙ Selected for the best award **Tatwa** for the current quarter ending April 11 to June 11.
- ⊙ I have been given an additional responsibility to generate on spot revenue by doing Top-up at the time of walk-ins by the customers. For this since last four months after the concepts starts I have ensured Gaya branch ranked amongst top few in the Zone.
- ⊙ Gaya branch has achieved six-sigma month after month in the service department, which in itself is the symbol of the highest level of quality maintained. This speaks about all the effort put in by me and my achievement.
- ⊙ Gaya Branch is one of the highest business volume branches. Providing service with the highest level of quality to such a large volume of customers single-handedly is an achievement in itself.
- ⊙ I have got the twice **claims excellence award** for the way I have handled claims and was at 6<sup>th</sup> position PAN India for the work done.
- ⊙ **Obtained 'A' rating in 1<sup>st</sup> ever audits done for Gaya branch.**

**Feb' 06 – 6-Oct' 07 with bajaj Allianz Life Insurance Company Limited, Patna  
As Senior Executive - Operational & Finance Dept.**

**Role:**

**Joined as executive in operations in Bajaj Allianz on 12th February, 06**

- Spearheaded New Business at Patna
- Imparted policy servicing
- Customer Handling
- Established a new branch

**Agency from (1st March, 06 to 11th June, 07)**

- Handling of IC requirement – advisor servicing
- Ensured effective resolution to ICs quires
- Generation of code and licensing of ICs

**Finance Department:** Date From 12th June, 06

In-charge to manage all the financial management of the patna hub branch and its satellite branch( Biharsharif, Hajipur, Patna Sahib, Forbisganj)

- To manage and regular monitoring for expense payments/petty cash through cheques and cash, made at the branch and the respective satellite offices (SO).
- To ensure proper and smooth cashiering at all the five locations on daily basis.
- Ensure cash and cheque banking next day.
- To manage complete distribution of commission cycle at every commission cycle for all the locations.
- Ensure managers reimbursement with proper monitoring for all the five locations.
- Petty cash management for all the five locations
- Reconciliation of the total receipts from the H.O with expenses at branch and its satellite locations separately.
- Cheque dishonour Process.
- Maintaining petty cash, cash register, commission register, reimbursement register etc.

**Attainments**

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- ✓ In the short duration of 3 months I was promoted to the finance department based on my sincerity and ability.
- ✓ First Agency In charge of the Patna 3 branch of Bajaj Allianz.
- ✓ The entire process of recruitment and training was started and systemized by me for the first time in the branch.

**Joined Regional Office in Jan 2007**

- ❖ Regional Coordinator for agency management, Bihar and Jharkhand
- ❖ Regional Coordinator for operations, Bihar.
- ❖ Co-coordinating with HO.

**April' 2000 – Jan' 06 with Software Education & Research Pvt. Ltd. Patna  
As Entrepreneur**

**Role:**

- Worked as the VUE Administrator
- Looked after Company Management
- Management of Office Staff

I was one of the pioneers in starting and establishing the company. It was the first VUE testing centre in the entire Bihar region. Coordinating with the government agencies, registrar of companies, banks was one of my core functional areas in this organization.

**Attainments**

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- ⊙ Declared consecutively for two years best VUE administer award in India.

**Extra Curricular Activities**

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Listening songs, playing cricket and table tennis.

**Personal Details**

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Contact Address : Flat no.402, Ashirwad Apartment Boring Road Patna-800001 Bihar  
Date of Birth: 26<sup>th</sup> June 1974

**Education**

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- ⊙ B.sc Physics honours from Magadh University, Patna, with First Division in 1996
- ⊙ MDBA (International business, Financial management) from SIMS, SYMBOISIS,

**Certifications**

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Pursuing **Licentiate** from Insurance Institute of India.  
**Pursuing** diploma in customer Relationship Management 2010.

**Computers:**

- Window 98/2000, DOS, MS-Office
- Tally 7.2 (Institute of Computer Accountants)
- Proficient user of Internet

**References: Available on request.**