



<b>Current Designation:</b>	Sr. Executive – Life Insurance	<b>Proposed Designation</b>	
<b>Department/Group:</b>	Life & General Insurance	<b>Occupied by</b>	Ruchi
<b>Location:</b>	Mumbai – Kandivali	<b>Position Type:</b>	Full-Time
<b>Reporting Relationship</b>			
<b>Reports to:</b>	Operation Manager	<b>Positions Supervised</b>	NA
<b>Internal Relation:</b>	CRM, Dispatch, Back Office Executives	<b>External Relation:</b>	Insurance Companies, Customers
<b>Mandatory Skills:</b>			
<b>Behavioral</b>		<b>Functional</b>	
<ol style="list-style-type: none"> <li><b>Customer Service Skills</b> – Should have a natural inclination for Customer servicing and be able to go the extra mile.</li> <li><b>Communication Skill</b> - the executive must be able to communicate with audiences of all types. Strong communication, multiple language skills are a plus</li> <li>Proven ability to work with goals</li> <li>Delivering client-focused solutions and in creating long-lasting relationships</li> <li><b>Rejection Handling Skills</b> - The executive should be aware that rejection is a part of Sales and should not get demotivated</li> <li><b>Passion</b> - The executive should be passionate about selling insurance and equally passionate to understand the need of the customer.</li> </ol>		<ol style="list-style-type: none"> <li><b>Knowledge about all Schemes</b> - Executive helps in promoting and selling of insurance products and services to its customers, so he/she should be strong with knowledge and General awareness about the markets</li> <li><b>Advisory Skill</b> - The executive who is into New Business should have sound financial advisory services and support clients accordingly.</li> <li><b>Business Development</b> – Business strategies needs to be pursued aggressively.</li> <li><b>Budgetary allocation</b> - As a sharp Insurance advisor, knowing the customer’s budget is very important, so that in turn will help his/her clients to get the cheapest or the best insurance product prices</li> </ol>	
<b>Job Description</b>			
<b>Role and Responsibilities:</b>			
<ol style="list-style-type: none"> <li>The prime responsibility is to develop New Business in General &amp; Life Insurance for the company.</li> <li>Make sales calls to existing and new customers for business growth.</li> <li>Perform customer negotiations and reach a fair conclusion from both business and customer perspectives.</li> <li>Be competitive to generate new business by contacting potential customers</li> <li>Demonstrated ability to communicate, present, influence and sell effectively via phone calls</li> <li>When promoting insurance brands, needs to have a carefully drawn roadmap</li> </ol>			



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7. Breeding productive relationships to create a pool of prospective clients from various sources by networking, cold calling, using referrals etc.
8. You will sell, solicit, differentiate and negotiate insurance plans that match the needs of your assigned or prospective customers' portfolio. Evaluating business or individual customers' needs and financial status and proposing protection plans that meet their criteria
9. Tailoring policies to fit client's coverage needs and financial status.
10. Develop product presentations and demonstrations to customers.
11. Marketing strategies needs to be drawn and re-drawn from time to time, keeping in mind the customer preferences.
12. Work with Operation Manager in implementing sales promotion activities
13. Well-planned strategies and plans need to be chalked out.
14. Public-relation (PR) building exercise should be given significant importance
15. Should make Quotations and Plans of GIC for the customer
16. Will be responsible for doing all Online policy issuance of travel / transit etc
17. Handle all queries of the customer effective and update status time to time
18. Every follow up with clients/ insurance companies should be in writing
19. Letters/ reminders emails /calls and maintain the call log in the system
20. Ensure all the complaint of the client is handled with complete satisfaction and no room for doubt should be left. Customer satisfaction is the utmost importance every time.
21. All cheques pick-up / hand delivery/courier should be done proactively and it should not be given to the customer.
22. Office folder, documents have to be maintained and handled with great responsibility.



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