

<b>Current Designation:</b>	Customer Relationship Executive	<b>Proposed Designation</b>	
<b>Department/Group:</b>	All Department	<b>Occupied by</b>	
<b>Location:</b>	Mumbai – Kandivali	<b>Position Type:</b>	Full-Time
<b>Reporting Relationship</b>			
<b>Reports to:</b>	Manager	<b>Positions Supervised</b>	None
<b>Internal Relation:</b>	Data Management Executive, Dispatch, CRM, BDM, Runners	<b>External Relation:</b>	Insurance Companies, Customers
<b>Mandatory Skills:</b>			
<b>Behavioral</b>		<b>Functional</b>	
<ol style="list-style-type: none"> <li>1. Proactive</li> <li>2. Persuasive</li> <li>3. Empathy</li> <li>4. Customer-centric</li> <li>5. Keen to learn</li> <li>6. Target Driven</li> <li>7. Good Communication &amp; networking skills</li> </ol>		<ol style="list-style-type: none"> <li>1. Identify the customer’s product/plan requirement</li> <li>2. Identify/understand customer problems and areas of concern</li> <li>3. Abreast with various insurance plans &amp; policies available</li> <li>4. Has a good knowledge of various types of Insurance - Life, General, Property, Marine, Fire, Liability, Social, etc.</li> <li>5. Understand the current product portfolio</li> <li>6. Knows all lines of authority and respects Limitations.</li> </ol>	
<b>Job Description</b>			
<p><b>Role and Responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Customer relationship management with existing &amp; new customers</li> <li>• Understand customer requirements and suggest appropriate solutions</li> <li>• Identify key concern areas and devise solutions alongside with operations manager</li> <li>• Build &amp; develop own database of potential customers</li> <li>• Rightly assess their insurance/investment requirements</li> <li>• Ensure quick closures of potential candidates</li> </ul> <p><b>Education &amp; Experience:</b></p> <ul style="list-style-type: none"> <li>• Education: Minimum Graduate</li> <li>• Experience: 2Years &amp; above</li> </ul> <p><b>I have read and discussed the above and I fully understand the description of my job and agree to abide by this description of my duties.</b></p>			

