

ANKUR RAI

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Seeking freelance position to manage Training & Customer Service/ back office operations, with a reputed organisation in the BFSI/Service / Consulting / BPO / KPO & Telecom sectors.

CAREER SNAPSHOT

- ⇒ Have extensive experience in Training Sales & Support Functions in Insurance, Pharmaceutical Education & Real Estate Industry with 5.5 years in Pharma sales & 15+ years in Insurance Sales & Training.
- ⇒ Apart from Insurance Conducted TTT for Education Dept. trainers, Real estate firms like Cosmic Structures, Earth Infra etc.
- ⇒ Apart from managing overall performance enhancement systems in the branch for both Sales & Support functions in conjugation with HR Dept.
- ⇒ Demonstrated excellence in setting-up entire branch operations system along with core team development for Future Generali Life Ins Co Ltd at Lucknow location.
- ⇒ Proven track record of Sales & Training both in Insurance & Pharmaceutical industry and ensuring delivery of targets through training support.
- ⇒ Have handled responsibility to be the SPOC for all training related queries in UP West region at Future Generali.
- ⇒ Have received an over all Annual Rating of Above Expectation consecutively for 3 years in Training related assignments with both Kotak & Future Generali India Life Insurance Co Ltd.

CORE COMPETENCIES

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|-------------------------|--------------------------|---|
| -Training & Development | -Team Management | -Customer Service Management |
| -Back Office Management | -Relationship Management | -Thorough understanding of financial products |

ORGANISATIONAL DETAILS

Oct'22 – till date Marketing Manager (MF Distribution)
ShreeJanshree Capital & Insurance Marketing Pvt. Ltd. Lucknow

June'19 – 3rd Oct'22. Cluster Training Manager (Agency. IM & PD Channel)
Future Generali Ind Life Insurance co Ltd., Lucknow

Nov'16 – May'19. Synergy Learning & Development Manager (Agency. IM & Direct Channel)
Future Generali Ind Life Insurance co Ltd., Lucknow

Learning & Development Dept. includes all kind of Training support to Sales & non sales team, also participate in sales target achievement of the branches through NLA Coding & activities like driving advisor activation etc. Taking care of training related needs of 3 different channels i.e Agency, Direct & IM

July'14 – July'16 Manager Training & Sales Quality UP.
HBL Global, HDFC Bank Ltd. Credit Cards & Merchant Acquiring (Payments Business)

Profile includes over managing team of DIP Desk Staff involved in processing of CC & ME physical applications, Pre & Post issuance X Sell along with dual role as a Regional Trainer.

Role:

- ⇒ To arrange & conduct Sales & Processes training to concerned Sales & DIP Staff.
- ⇒ Maintain Quality & Audit parameters at the DIP Desk.
- ⇒ Maintain balance b/w Training & DIP Processing by managing challenging dual role of an Sales Quality & Training Manager.
- ⇒ Have been the first Trainer & SQ Manager for the region hence had to work tirelessly in terms of gathering 100% acceptance towards Training & DIP Staff management.
- ⇒ Had the accolade of being the highest performing Non QM location on DIP X Sell parameter.
- ⇒ KRAs include parameters like CC & ME GAR, ME Ops FTNR %age, Training Man Hours, DIP Management etc.
- ⇒ Have achieved an rating of **Very Good** during the first appraisal in the month of April'14.

April'13 – till Sept'13 Area Learning & Development Manager (Raj. & Guj. Region)
Future Generali Ind Life Insurance co Ltd., Lucknow

Got promoted to Regional profile with L&D Dept. as Area L&D Manger & Regional Coordinator in the month of April'13 based at Jaipur location.

Took care of 9 branches spread across the region.

Supervised team of 5 Branch L&D Managers based at different locations across the region.

April'08 – till April'13 Branch Learning & Development Manager
Future Generali Ind Life Insurance co Ltd., Lucknow

Learning & Development Dept. includes all kind of Training support to Sales & non sales team, also participate in sales target achievement of the branches through NLA Coding & activities like driving advisor activation etc.

Role:

- ⇒ To effectively execute the Agency Channel L&D plans for business impact within the branch.
- ⇒ Develop an overall L&D approach which is aligned with the channels specific technical competencies, business process & strategy within the region.
- ⇒ Have been major resource for the organisation for Managerial level trainings & Induction program in UP & NCR.
- ⇒ Develop domain learning paths for Agency Partners in line with growth within the branch.
- ⇒ Responsible for developing the domain and various technical competencies across Agency channel in the branch.
- ⇒ Impact & Improve sales effectiveness across Agency channel in the branch.
- ⇒ Support BM/AM/RMs for developing relevant, timely and customized knowledge & skills in there teams with inputs from HR.
- ⇒ Plan, Schedule and calendarize learning programs at the branch.
- ⇒ Execute appropriate action on the basis of Agency channel L&D MIS and dashboards clearly showcasing trends and improvements.
- ⇒ Remain updated with the latest in the industry and make necessary tactical changes to the training execution as per need.
- ⇒ Responsible for successful dissemination of product launches and special campaigns across Agency channel in the branch.
- ⇒ Execute cost effective training plans for Agency channel in the branch.

Noteworthy Contributions and Achievements:

- ⇒ Joined FGI at inception level hence had rich experience of establishing Insurance Comp. in terms of Systems and processes.
- ⇒ Achieved 60% Activization of NLA's for Dec'09 & Jan-Feb'10.
- ⇒ Maintained 60% + pass %age in IRDA Exams through Refresher training of IC33 on YTD basis.
- ⇒ Had the accolade to be among top 20 branches PAN India in Pass %age.
- ⇒ Received Certificate of Achievement (Silver) for advisor activation in Q2 of FY 09-10.
- ⇒ Received Certificate of Appreciation by CMO in March 11 for contribution in Limbo & Suspended advisors activation

Sept'07 – April'08 Branch Training Manager
Kotak Life Insurance Co. Ltd, Kanpur.

Role:

- ⇒ Plan, Schedule and calendarize Training programs at the branch for Agency & Alternate channels.
- ⇒ To effectively execute the Agency Channel training plans for business impact within the branch.
- ⇒ Insure training and overall development of employees & agents.
- ⇒ Addressing issues of team members and providing timely resolutions.
- ⇒ Planning on field demo calls with Sales mangers & Agents to insure direct business impact.
- ⇒ Responsible for successful dissemination of product launches and special campaigns across Agency channel in the branch.

Aug'06 – Sept'07 Branch Training Manager
Bajaj Allianz Life Ins. Co Ltd, Lucknow

Role:

- ⇒ Impact & Improve sales effectiveness across Agency channel in the branch.
- ⇒ Also responsible for Training, Quality, Work Flow Management and Transitions.
- ⇒ Interacting with clients on feasibility and delivery models and providing feedback to the management.
- ⇒ Work in association with Area Manager of sales to take care of his need base training requirements arising across the region.
- ⇒ Ensuring adherence to timelines in Reporting, Client Servicing and Co-ordination.
- ⇒ Formulating & implementing project plans to ensure timely execution of a campaign / process.
- ⇒ Handling rewards, recognition, growth and appraisals for employees.

Aug'05 – Aug'06 Unit Manager
ICICI Prudential Life Ins. Co Ltd, Lucknow

Role:

- ⇒ Spearheading team creation through recruitment of agents based on norms set by IRDA.
- ⇒ Mentoring and facilitating overall business productivity of recruited agents following the organisational standards.
- ⇒ Monitoring agent-wise performance MIS, preparing roster and allocating targets to the team members.
- ⇒ Working extensively in field with team to insure regular productivity.
- ⇒ Managing recruitment on agents and selection process and other associated functionaries.

Noteworthy Contributions:

- ⇒ Achieved 24 Lacs of issued WAPI.
- ⇒ Maintained team of 16+ active agents through out.
- ⇒ Won 10 grms gold coin in UTSAV contest run by company for recruitment & coding of agents.
- ⇒ Actively involved in activities like BTL & COP's.

Nov'1999 – Aug'05 Sr. Business Officer
Zydus Cadila Health Care Ltd, Lucknow

Role:

- ⇒ Overall maintain & generate demand of products of company through means of generating prescriptions from doctors.
- ⇒ Meeting monthly budget assigned through insuring availability of products at whole sale and retail level.
- ⇒ Time to time engaging customers in groups to support the organisation through CME's etc.

Noteworthy Contributions:

- ⇒ Achieved brand leadership for products like Ofline, Nucoxia, Aten & OcidIV within two months of launching in **KGMU & Gomti Nagar** area
- ⇒ Received appreciation and a formidable position in terms of prescription for products like Ocid IV, Offline & Nupatch at **Mayo Medical Centre**.
- ⇒ Initiated late evening calls for Doctors in Hospital Wards & in turn created excellent results in prescription generation.
- ⇒ Arranged Medical Quiz for Junior Doctors (department wise).
- ⇒ Arranged film shows for Junior Doctors.

CERTIFICATIONS

- ⇒ Successfully completed PL Training Certification program conducted by GE Money in July'07.
- ⇒ Successfully completed FFF Certification program for providing training to Assistant to Senior Manager levels at Kotak Life Ins. Co Ltd in Oct'08.
- ⇒ Completed III Licentiate certification in May'12.

SEMINARS ATTENDED

- ⇒ 5 days CFP orientation program conducted by RNIS in Oct'09.
- ⇒ 3 days seminar on Facilitation Skills conducted by FGI in June'10.

ACADEMIA

Completed 5 Year Integrated MSc Life Sciences from the University of Lucknow in the year 1997

PERSONAL DOSSIER

Date of Birth : 16th December, 1976.
Address : Sector-13, House No-11, Vikas Nagar, Lucknow-226022.
References : Available on request.