

CURRICULUM-VITAE

T-75 Road No-20
Bheel Basti Baljeet
Nagar West Patel
Nagar New Delhi-110008
Mobile: +919718364044
E-Mail: rohitverma730@gmail.com
Date of Birth: 16th Jul 1991
Language: - Hindi & English
LinkedIn ID- <https://www.linkedin.com/in/rohit-verma-361473128>

ROHIT VERMA

PROFESSIONAL CAREER OBJECTIVE:-

To achieve a position utilizing my organizational, interpersonal & communication skills to grow with the growth of an organization.

Professional Attributes:

KEY RESPONSIBILITIES Retention Management Operations Management Customer Relationship Management	<ul style="list-style-type: none">➤ A dynamic professional with more than 7 years of Retention, and Back office, customer escalations and client servicing experience in prestigious organizations.➤ Possess sound practical knowledge in developing professional relationship with clients and customers.➤ Excellent public speaker, motivator, complex problem encountering ability with exclusive
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Experience Overview:-

With over 7 years of progressive experience with specific expertise in Life Insurance **Operations|Retention|Renewals and Call center Operations**. An effective communicator with strong analytical, problem solving & organizational abilities.

❖ Work Experience:-

- ❖ Currently working with **MAX BUPA Health Insurance Company**, as a **(Assistant Manager- Renewals)**
Tenure: - 20th July 2019 to till date.

Operations Management

- Support Regional Teams and work closely with Zonal Managers (for mapped channel/s) for improving renewals collections and retention.
- Drive Channels persistency (both on NOP and GWP) as per desired defined outcomes.
- Drive upsell in the channel to provide results as per benchmarks defined.
- Drive Cross Sell in the channel till last mile as per the parameters defined.
- Take up 2 years conversions in line with department's target.
- Ensuring Escalation on Closures, seamless Support to Sales & branch offices to smoothen the process.
- Publish MIS's within the one to drive the results.
- Take initiatives to enhance persistency to desired levels through structured actions and initiatives in consultation with reporting manager.

- Travel to branches and meet all stakeholders and agree on corrective action plan (CAP) to improve persistency and then track the same by publishing MIS.
- Drive new initiatives within the Zone/Channel till last mile including distributors
- To Coordinate with branches, sales team (all levels) while providing full update to the one Head/Channel Head to meet desired outcomes
- Drive new initiatives within the Zone/Channel till last mile including distributors.
- Work closely with Central Renewal Team to provide feedback on processes and share VOC (both internal and external customers) which becomes input for process improvement.
- Train BOSS team on new processes pertaining to Renewals.

Previous Experience:-

- ❖ Worked with **DHFL Pramerica Life Insurance Company Ltd. DPLI**, as a **(Senior Executive - Back Office Ops) Renewals Department.**
Tenure: - 18 May 2016 to 18th Jul 2019. (3 years & 2 months.)

Operations Management

- Co-ordinate with Branch Renewal Executives & Field support officers to help build a strong control mechanism for North, Central & East Zones.
- Reports directly to Sr. Manager (ZRM) Zonal renewal manager and coordinating a team of 42 (ARM/BRE/Runners) Area renewal Managers, Branch renewal executives and Runners (North, Central & East Zone).
- To drive collection through **DPLI Branches**, region and zone wise collection **Agencies & Sales Support.**
- Closely work with new business team, Finance, Remittance and underwriting department close the case.
- To ensure Renewal Manual debit data should be shared with the respective Area heads and ensure it should get processed within TAT.
- Taking care of Auto Debit (**ECS/NACH/Direct Debit**) Registration & Transaction Process.
- Debit & Re-debit to Improve Renewal Persistency (13th Month)
- Assist in processing mode change cases and other service request related to successful policy revival. **DGH +Medical** pending lapsed to be Revival & coordination for policy revival.
- Follow up with customers for Managing **13th & 25th** month renewal Persistency & visit the HNI client as per requirement.
- Share **MTD / FTD** report with ARMs for timely tracking on paid cases, maintaining **APE** movement MIS and share the same with ARMs on daily basis, also send cheque bounce tracker with team and follow-up with them for closure, prepare maintain PDC tracker for Delhi/NCR zone and share every Monday and Thursday with ZBM and team leaders.
- Follow-ups with Finance Team for cash approval on Daily Basis for North, Central & East Zone. Supporting line manager in handling query related to **MPOS Machine & Authorization letters.**
- SPOC between the Call Center(s) and Field to resolve issues related to lead collection and provide real-time solutions.
- Handling IT issues and **UAT** testing.
- Itinerary validation from north & central zone. / **Reimbursement** all bills for north & central zone.
- Regular MIS to be shared zone wise for increasing overall collection. & supporting team during month & process.
- Handling Query/concern related to Renewals for north & central Zone. Assist in processing mode change cases and other service request related to successful policy revival.
- Managing regular con calls with vendor for process improvements and providing support to vendor. Also managing vendor billings.
- Doing constant follow-up on leads file shared by Call center and provide them real time updates and solutions, provide them filed feedback on HNI case if require, follow-ups on postponed leads and try to close them as soon as possible, also arrange the field visits for cases which are not contactable from call center team.

Previous Experience:-

- ❖ Worked with **Pace Setters Business Solution Pvt. Ltd. As a Senior Executive- Retention (Operations) (Process-PNB MetLife India Insurance Co. Ltd)**
Tenure: - 24 NOV 2012 to 29 FEB 2016.

Pace Setters is one the preferred vendor for **PNB MetLife India Insurance Co Ltd** for bringing in collections from the customers who have not been continuing their policies.

❖ Retention Process:-

- **Profile:** - (In PnbMetLife we provide service for Medical and Declaration of Good Health like taking health information over the call and Arranged medical in all over India we directly contact with the **underwriter for reinstatement** request and coordinate with the Health India TPA. we Also provide premium collection support, making and maintaining MIS on daily basis, responsible for handling customer related queries.

Suspense Analysis: - which involves end to end follow up with underwriting team and Medical vendors to ensure smooth functioning of **DGH, Medical** to be perform efficiently and money to be realized to policy holders? (Minimized the gap of **PDRT Policy Deposit regulatory term- Unallocated and Unclaimed balance management and Lapsed Reinstatement**).

- Managing the Overall PDRT file and allocation of the eligible money in PD suspense.
- Tracking customer complaint and request received through Talisma and ensuring closure within TAT.
- Amount lying in the Suspense account to be cleared and make ensure it gets Allocated in the system.
- Revival of lapse Policies and ensuring maximum collection.
- Established, cultivated, and maintained productive customer and branch relationships.
- To drive collection through PNB MetLife Branches, Collection Agencies & Sales Support.

Life Asia: - In Life Asia customer policy details are online access through we can check the customer policy status/issue date/premium/partial surrender ECS, ACH, details etc.

Filenet: - Filenet is a place where customer documents (proposal form/ID/Address proof/questioner etc.) scan copy uploaded.

Communication Management: - To drive renewal collection through customize and effective communication.

- ❖ Worked with **SMC Global securities P.v.t Ltd.** As a **Relationship Manager.**
Tenure: - Oct 2011 to March 2012).
- ❖ Worked with **Angel Broking P.v.t Ltd.** As a **Relationship Executive.**
Tenure: - May 2012 to Oct 2012).

JOB RESPONSIBILITIES:-

- Customer Relationship Management. And providing better services to the clients.
- Dealing with self-generated and leads generated by the calling team till final Realization of query.
- Opening of **Demat & trading** accounts.
- Trading on the behalf of clients.
- Back Office Accounting. & Client Confirmation of their Accounts.
- Following compliances. & Process training to the new interns.
- Generating Leads or increasing client's database. To Accomplish set target
- Filling and Checking Account Opening Forms according to **KYC Norms.**
- Customer Dealing Management. / Preparing Daily MIS and DSR (**Daily sales report.**)
- To enhance Profitability of the business by ensuring cross selling of other products like Insurance, PMS (**Portfolio management system**) Etc.

Strength

- Committed team player with flexible approach and result oriented.
- Proficient in handling multiple tasks simultaneously in challenging environments.
- A proactive learner with a flair for adopting latest trends & work methods.
- An effective communicator with strong analytical, problem solving & organizational abilities.

Growth, Promotions overview

❖ Assistant Manager- Renewals	Max Bupa Health Insurance Company.
❖ Senior Executive Back Office - Ops	DHFL Pramerica life insurance India Co.
❖ Sr. Customer service Executive	PNB MetLife Insurance India Co.
❖ Relationship Manager	SMC Global securities Pvt. Ltd.
❖ Relationship Executive	Angel Broking Pvt. Ltd.

Academic Credentials

- Completed B.A Graduation From Delhi University.
- Passed 10th and 12th from C.B.S.E Board New Delhi.

Personal Information

Father's Name	:	Late .Sh. Nandlal Verma
Nationality	:	Indian
Marital Status	:	Married
Hobbies	:	Listing music

DECLARATION

I hereby declare that the above written particulars are true to the best of my knowledge and belief.

Date: - -
Place: New Delhi

Rohit Verma