

Swagat Chavan

Borivali, Mumbai, MH 400 091 | +91 703-281-0505 | swagatchavan@gmail.com

PROFILE

- Experienced Professional with more than 11 years of demonstrated history of working in the Financial Services/ Sales/ Business Development Industry with Domestic and International Client Relations.
- Skilled in Enterprise, B2B, B2C, Team Management, Microsoft Office, Banking, Broking and Cyber Security Products.
- Polished, confident, articulate, ambitious, fast learner and adaptable.

EXPERIENCE

EC Council

Mumbai

Assistant Manager (Business Development)

Jul' 18 - Present

- Responsible for Business development & Revenue growth 'internationally' (Besides USA & Canada)
- To generate own qualified leads through Internet & Phone research, Networking and Referrals
- Actively prospect and connect with new clients (Enterprise & B2C) to inform, persuade and give the benefits of Live Online training or collaborate as partners (Training Institutes) with EC Council
- Ensuring partners are aligned to the objective and growth plan of the company. Hand holding partners by product & sales training, marketing events, social media campaigns, client meetings, info sharing etc.
- Build strong, profitable business relationships and ensure sales targets achievement - manage and sustain sales pipelines
- Work well in the team environment with all members, giving ideas and working collectively to grow the iWeek division

Angel Broking Pvt. Ltd.

Mumbai

Team Leader (Digital Sales)

Oct' 17 – Jun' 18

- Providing leadership to call center executives daily through one-on-one coaching, morning huddles and end of day meetings
- Monitoring advisors on aspect for real time adherence, Audits on appointments of post payment and pre-closure cases
- Regular floor walks and Query resolutions of Advisors during their calls
- Preparing & presenting various weekly/monthly MIS reports pertaining to process and productivity
- Performing call quality audit of the executives and providing feedback. Identifying fatal errors and non-fatal errors impacting the process and take corrective/preventive action and thus maximize productivity
- Tracking and reviewing team's performance through reports of Daily Sales, Lead Status and Appointments
- Plan, facilitate and organize training session for all agents and participate in recruitment of new team members

Achievement

Received a Year-End Rating of STAR for exceptional performance

Desai & Associates

Mumbai

Associate (Self-employed)

June' 15 - Sep' 17

- Prepared cost budgets, planned and served as liaison during all audit phases
- Conducted client interviews and led internal meetings to facilitate effective and efficient deal planning and execution
- Communication with clients for proactive and timely feedback for improvement in order to maximize client satisfaction
- Performed risk assessments and financial review for over 20 projects
- Compiled and presented surveyor findings and suggested practical business improvement

IndusInd Bank Ltd.

Mumbai

Manager (Retail Branch Banking)

Sept' 14 - Mar' 15

- Handle a team of Relationship Officers to up sell Bank products, Mutual Funds/Insurance products to HNI Clients as per the assigned database & generation of fresh leads through reference to shore up the clientele
- Review client portfolios with Relationship Officers for improvement in services and Relationship deepening
- Analyze performance and give feedback to the team to strategize regarding the achievement of sales and service targets with focus on customer experience
- Track closures of requests/ grievance/ complaints logged and co-ordinate with the Branch Operations / Centralized Operations to facilitate closure within TAT

Kotak Mahindra Bank

Mumbai

Deputy Manager (Consumer Banking)

Sept' 12 - Sept' 14

- Handle NRI and HNI clients with respect to remittances and Forex Transactions
- To look after servicing activities like Account Balances, Fund Transfers, Statement requirements, in coordination with respective RMs & allied internal departments
- Verification of new clients for Account Opening, verify and check their documents in adherence to KYC/AML compliance requirements and ensure each customer in the portfolio is KYC compliant
- Ensuring regular updates of Risk Profiling and Family Mapping of all customers
- Update clients regarding the new product launches. Responsible for achieving sales and service parameters and cross selling of NRE, NRO, FDs, Mutual Funds, Insurance, Credit Card, Loans, Forex transactions etc.

Achievement

Won certification for the month of Feb -14 for over achieving SIP & FD targets

HSBC Ltd.

Mumbai

Senior Executive (Contact Centre)

Nov' 07 - Aug' 12

- Handle NRI customers' assets and liabilities queries, remittances and redirecting them to the concerned departments for an end-to-end solution and following up on the same
- Achieving the revenue targets by cross selling Banks Products and Services like Remittances, Term Deposits, SIP, HNI family accounts, Home Loans etc.
- Assisting new NRI clients to establish relationship with the Bank by helping them with Transfers and Tracking of Funds (Foreign Currency) to NRE/NRO Savings Account
- Ensuring complete and accurate resolution of queries within the defined TAT following process compliance as per the set Audit, QC and Service Quality guidelines

Achievement

Promoted to Level 4 to service the elite HNI NRI Clients in June 2011

Won certification of SALES STAR for the months of Jan' 12, Feb' 12, May' 11 and May'10

EDUCATION

Bachelors in Science (B.Sc.) from Mumbai University in the year 2007

Diploma in Banking & Finance from Indian Institute of Banking & Finance (IIBF) in the year 2009

AMFI (Association of Mutual Funds in India) certified in the year 2014

SKILLS & SPECIALITIES

Business Development, Web/Internet & LinkedIn Research

Good understanding of Banking/ BFSI products & processes

Good knowledge of Mutual Funds, Broking & Capital Market

Technical Skills - Conversant with Android, MS Windows OS & Office Applications (Word, PowerPoint, Outlook and Excel)

Systems & Applications – Zoho CRM, OneHSBC, GoToWebinar, Skype, Zoom, MS Teams.

PERSONAL DOSSIER

Date of Birth 04 January 1987

Linguistic Abilities English, Marathi & Hindi

Marital Status Single

Nationality Indian

The above furnished details are true to the best of my knowledge and ability

SWAGAT CHAVAN