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NIRVIN NAIR

BANKING PROFESSIONAL

PROFESSIONAL SUMMARY

Dedicated Banking & Insurance professional with a history of meeting company goals utilizing consistent and organized practices. Skilled in working under pressure and adapting to new situations and challenges to best enhance the organizational brand.

CORE QUALIFICATIONS

- Effective Communication
- Team Player
- Sales and Business Development
- Proficient in MS Excel, Word, PowerPoint
- Lead Generation & Fulfillment
- Interpersonal Skills
- Core Competencies
- Financial Product Knowledge
- Customer relationship building
- Decision-making
- Client Relationship Management
- Computer Skills
- Outstanding customer service

WORK HISTORY

Branch Banking Relationship Officer, 04/2025 - Current

Axis Bank Ltd – Mumbai

- Strengthened client relationships through regular communication and personalised financial advice.
- Assisted clients in understanding complex banking terms, enabling informed decisions about their financial future.
- Supported branch operations by performing routine tasks such as cash management, teller transactions, and loan processing when needed.
- Streamlined processes for account opening, ensuring faster turnaround times and improved client experiences.

- Facilitated efficient collaboration between mortgage specialists, investment advisors, and other internal partners for seamless customer service delivery.
- Developed comprehensive financial plans for clients, leading to improved overall financial health and long-term customer loyalty.
- Resolved customer complaints promptly, maintaining a high level of professionalism and commitment to excellent service.
- Initiated proactive follow-up with customers to ensure their ongoing satisfaction with bank products and services, resulting in increased referrals and repeat business.
- Developed and maintained strong knowledge of multiple products and varying levels of benefits within each product.
- Built and deepened productive relationships with prospective and competitive customers to drive sustained growth.
- Cross-sell various bank products (loans, insurance, mutual funds) and third-party offerings.
- Introduce customers to digital channels (mobile, internet banking).
- Ensured high audit ratings and meet internal requirements.
- Maintained customer data in the CRM system.
- Generated leads and nurture existing customer portfolios.

Sr. Corporate Agency Manager, 01/2023 - 03/2025

HDFC LIFE INSURANCE COMPANY LTD – Mumbai

- Led the Bancassurance channel for HDFC Life Insurance, collaborating with HDFC Bank to promote and sell insurance products
- Developed and maintained strong relationships with key stakeholders, including branch managers and relationship managers, resulting in increased cross-selling opportunities
- Conducted regular training sessions to enhance the insurance selling skills of bank staff
- Ensured adherence to regulatory requirements and internal compliance policies during the entire sales process
- Analyzed market trends and competitor activities to identify growth opportunities and strategize sales plans accordingly.

Virtual Relationship Manager, 08/2021 - 12/2022

KOTAK MAHINDRA BANK – Mumbai

- Managed and nurtured a portfolio of 1500 Clients by offering tailored financial solutions and advisory services
- Exceeded sales targets consistently, resulting in the growing revenue for the Bank
- Built and maintained strong rapport with clients to understand their financial goals and provide suitable banking products and services

- Acted as a primary point of contact for customer inquiries, resolving issues promptly to ensure customer satisfaction
- Collaborated with cross-functional teams to address client needs effectively and offer comprehensive financial solutions
- Conducted regular customer engagement activities to enhance client retention and cross-selling opportunities
- Stayed updated on industry trends, financial products, and regulatory changes to offer informed advice to clients
- Achievement: Won the Award for Best Debutant in generating highest conversion in sales.

Customer Service Associate, 10/2020 - 07/2021

Teleperformance, Axis Bank Contact Centre – Mumbai

- Outbound Contact Centre
- Process (Personal Loan Acquisition), Successfully promoted and sold Axis Bank's personal loan products to prospective customers through outbound calls
- Consistently achieved and surpassed sales targets, contributing to the overall business growth
- Effectively communicated loan features and benefits, addressing customer inquiries and concerns
- Utilized persuasive selling techniques to convert leads into customers and achieve high conversion rates
- Maintained accurate and up-to-date customer records and sales data in the bank's CRM system
- Collaborated with team members to share best practices and enhance overall sales performance
- Ensured compliance with all banking regulations and internal policies during the sales process.

EDUCATION

Master of Business Administration: Operations Management, 01/2023

Narsee Monjee Institute of Management Studies - Mumbai

Bachelor of Business Management Studies: Marketing, 01/2019

Tilak College of Science and Commerce - Vashi, India

LANGUAGES

Hindi: First Language

English: C2 Proficient