



# KAJAL DEVI

## RELATIONSHIP OFFICER

### PROFILE

Experienced Financial and Relationship Manager with 5 years of expertise in banking products, customer acquisition, and market analysis. Proficient in product development, I have a proven track record of driving product performance and improving customer satisfaction through data-driven insights and innovative financial solutions. Skilled in managing cross-functional teams, ensuring compliance with regulatory requirements, and building strategic partnerships that foster long-term success.

As a Relationship Manager, I excel at developing strong client relationships, understanding their financial needs, and offering tailored banking solutions to enhance customer retention and loyalty. My ability to effectively manage client portfolios, deliver exceptional service, and optimize financial products has consistently contributed to business growth and organizational objectives. I am committed to leveraging my expertise to meet market demands and achieve business success in the dynamic financial sector.

### WORK EXPERIENCE

#### AIGB FINANCING Broker LLC DUBAI Relationship OFFICER

AUGUST 2024 - NOW

- Promoted credit card products through telecalling.
- Managed personal loan applications and guided clients through the process.
- Conducted cold calling to generate interest in loans and credit cards.
- Developed strong customer relationships through regular follow-ups.
- Utilized a referral system to generate leads from existing customers.
- Provided exceptional customer service by addressing inquiries and resolving issues.
- Collaborated with the sales team on marketing strategies for financial products.

#### PNB METLIFE Relationship OFFICER

2022 - 2023

- Provide support in the service and sales of life insurance products to both walk-in customers and leads generated by internal teams.
- Engage potential clients, addressing inquiries and providing comprehensive information on available life insurance policies.
- Convert leads into successful sales by understanding customer needs and recommending suitable insurance solutions.
- Ensure timely follow-up with potential clients, fostering positive relationships to increase the likelihood of closing sales.
- Collaborate with internal teams to manage and optimize the customer experience, ensuring smooth service delivery.
- Maintain accurate records of customer interactions, leads, and sales in the system for reporting and future follow-up.
- Meet and exceed sales targets, contributing to the overall growth of the life insurance business.
- Stay updated on the latest life insurance products and industry trends to provide clients with informed recommendations.

#### YES BANK LTD.

##### Branch Service Partner

2019 - 2022

- Assisted in achieving branch sales targets by promoting and cross-selling banking products, including loans, insurance, and investment services.
- Identified customer needs through effective communication, offering tailored banking solutions.
- Conducted product presentations to educate customers on benefits and features of various products.
- Built strong customer relationships to foster trust and loyalty through exceptional service.
- Collaborated with branch staff on targeted marketing strategies to enhance product visibility.
- Developed engaging sales materials to effectively communicate product offerings.
- Tracked sales performance metrics to evaluate strategies and identify areas for improvement.
- Actively sought customer feedback to enhance products and service delivery.
- Participated in ongoing training sessions to stay updated on banking products and sales techniques.
- Achieved personal and team sales targets, contributing to overall branch success.

#### PATHANKOT VEHICLELEASES PVT LTD.

##### Customer Care Executive ( CCE)

2017 - 2019

- Provided exceptional customer service, addressing inquiries and concerns about banking products.
- Assisted in achieving branch sales targets by promoting and cross-selling loans, insurance, and investment services.
- Engaged with customers to understand their financial needs, offering tailored solutions.
- Conducted informative product presentations to explain features and benefits of banking products.
- Developed strong customer relationships, fostering trust and encouraging repeat business.
- Collaborated with sales and marketing teams on effective promotional campaigns.
- Tracked customer interactions and sales performance, providing insights on preferences and trends.
- Resolved customer complaints promptly, ensuring high levels of satisfaction and loyalty.
- Participated in training sessions to enhance product knowledge and service delivery.
- Met and exceeded individual sales targets, contributing to overall branch success.

#### MAHINDRA & MAHINDRA AUTOMOBILE Showroom Sales Executive

2014 - 2017

- Assisted in achieving branch sales targets by promoting and cross-selling banking products, including loans, insurance, and investment services.
- Engaged with customers to assess financial needs and provide personalized recommendations.
- Conducted product demonstrations and presentations to highlight product features and benefits.
- Developed strong customer relationships through exceptional service and support.
- Collaborated with the showroom team on sales strategies and promotional activities to drive engagement.
- Tracked sales performance metrics to identify customer preferences and improvement opportunities.
- Resolved customer inquiries and complaints promptly to ensure satisfaction and loyalty.
- Maintained an organized showroom environment, showcasing products attractively.
- Participated in training sessions to enhance product knowledge and sales techniques.

### CONTACT

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### EDUCATION

2012 -2015  
GURU NANAK DEV UNIVERSITY,  
INDIA

- BBA

2010 - 2012  
PUNJAB SCHOOL EDUCATION  
BOARD, INDIA

- Senior Secondary +2

### SKILLS

- Project Management
- Public Relations
- Teamwork
- Time Management
- Leadership
- Effective Communication
- Critical Thinking
- CRM

### LANGUAGES

- English
- Hindi
- Punjabi