Neha Sikri

Senior Finance/Wealth Manager

Marketing | Strategic Planning | Client Relationship Management

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Personal Details

Date of Birth:
14^{th} February 1985

Languages Known:
English & Hindi

LinkedIn
https://www.linkedin.com/in/neha-sikri-330b2a18/

Key Impact Areas

- Sales & Marketing
- Client/ Stakeholder Engagement
- Process Improvements/Excellence
- People/Team Management
- Training & Development
- MIS Reporting & Documentation
- Project Management & Planning
- Individual Contributor

Profile Summary

- Focused & resourceful professional with over 12 years of rich experience in Business Development, Strategic Planning, Client Relationship Management and Open Market Acquisitions
- Proficient in managing major acquisitions and maintaining cordial relationship with clients for increased business
- Provide reporting, analysis and forecasting to facilitate strategic decision making and to track performance to operating goals
- Manage the finance function across revenue, general accounting, banking, direct & indirect taxation and MIS
- Capable of devising and implementing regional plans aimed at facilitating enhancement of business volumes and promoting products in the segment
- Expert in conducting analysis of market trends/ requirements, collating market intelligence reports and chalking out measures for countering competition
- Track record of delivering high-quality customer experience, elevating customer satisfaction, while adhering to the SLAs and work processes
- Skilled in preparing monthly reports and effectively managing documents for streamlining systems to facilitate achievement of organizational objectives and ensure profitability of operations
- An effective communicator with excellent interpersonal and strong analytical & organizational skills with flexible attitude
- Identify and implement best practices to make the Company, financial processes and internal controls more efficient and effective.

Career Timelines

HDFC BANK
KARVY PRIVATE WEALTH
DHFL Changing Rules Changing Lives
kotak Securities
IndusInd Bank
FRANCHISE INDIA Ideas For Tomorrow
RELIANCE Life Insurance
kotak Kotak Mahindra Bank
ICICI Bank

Organizational Experience

Nov'19 – Dec'20 with HDFC Bank Ltd, Bengaluru as Senior Manager

Major Products: Fixed Deposit, Mutual Funds, Equity, Life Insurance, Loans

Role Description:

- Responsible for providing financial advisory and solutions to ultra HNIs for investment of their personal wealth and assets.
- Accountable for client acquisition, key account management and portfolio management.
- Engaging as single point of reference for all product and solution offerings.
- Developing and servicing client portfolios around fixed deposits, direct equity, mutual funds, Life Insurance & loans.

Nov'17 - Jul'19 with Karvy Private Wealth, Bengaluru as Wealth Manager

Major Products: Fixed Deposit, Mutual Funds, Equity

Role Description:

- Acquisition of Corporate and Ultra HNI Clients for Wealth Products like Mutual Fund, Fixed Deposit, Equity, PMS, AIF, Loans.
- Managing the relationship and generating the repeat business from Key Accounts.
- On boarding of Trust for debt & FD business.
- Organizing different activities for existing and prospect clients for wealth management services.

Notable Attainments:

- Received appreciation from CEO in April 2018 & January 2019 for generating highest revenue in South.
- Appreciation received from CEO in the month of June 2019 for Top performer in Equity.
- Part of Special Initiatives team, representative of South.

Aug'16 - Sep'17 with Dewan Housing Finance Corporation Limited(DHFL), Bengaluru as Manager

Major Products: Fixed Deposit

Role Description:

- Managing acquisition for major clients and maintaining direct corporate relationships for Fixed Deposit, Mutual Fund, and Life Insurance
- Generating repeat business from existing & new clients
- Identifying new boundaries for acceptance of product and on-boarding potential IFAs to contribute in Fixed Deposit Business
- Directing detailing of Large & Mid Cap Corporate for business association
- Leading Retail Teams to generate retail ticket size
- Supporting Retail Teams in organizing activities to generate leads which led to closure of business
- Imparting training to teams on different products such as FD, MF, & Life Insurance assisting in business closure

Notable Attainments: Acknowledged for maintaining Service Request & Quality from National Head in 2016

Nov'14 - May'16 with Kotak Securities Ltd., Bangalore as Private Client Group Manager

Major Products: DMAT & Trading Account

Role Description:

- Worked in different functions of department for spearheading strategic planning, organising work and leading team
- Led acquisition of quality accounts for direct exposure in equity
- Performed different promotional activities for qualifying & potential leads generation
- Recognised target markets and emphasised on improving business from existing & prospective clients
- Maintained different MIS for productivity including top & bottom line
- Conducted drives for reference leads for generating qualifying leads for the team
- Managed UHNI, HNI & Corporate Clients to generate business
- Assisted team of HNI channel for product training for different products of Kotak Securities

Dec'13 - Nov'14 with IndusInd Bank Ltd., Bangalore as Select Relationship Manager

Major Products: CASA, Credit Card, Mutual Fund and Insurance

Role Description:

- Managed Sales, Marketing, Customer Acquisition and Customer Relations to maximise revenue
- Arranged promotional programs to improve sales and achieved target sales
- Devised and implemented various methods to achieve targets on a monthly basis
- Identified potential customers; generated business from existing accounts to achieve profitability level & sales growth

Notable Attainments:

- Won Best Relationship Manager Award from Zonal Head in 2014 for Credit Card & Mutual Fund
- Acknowledged for maintaining quality service in 2014
- Received award for being the best performer by selling the Topmost Credit Card of Bank in 2014

Aug'12 – Jul'13 with Franchise India Brands Ltd., Bangalore as Corporate Business Development Manager

Role Description:

- Managed brand acquisitions by strategic planning
- Worked within the Membership Marketing industry for selling & managing solutions in areas of Franchise, Investment and M & R (Marketing & Recruitment)
- Negotiated profitable & operationally viable deals offering growth for both Franchisee & the Franchisor
- Recommended suitable solutions & inputs wherever required to increase the closure probability

Notable Attainments:

- Recognised profitable accounts which assisted in increased & repeated revenue
- Won various Appreciation Awards from CEO & Director for Quality Brand Acquisition

May'11 - Aug'12 with Reliance Life Insurance Co. Ltd., Bangalore as Premier Relationship Manager

Major Products: Wealth Products & Financial Planning

Role Description:

- Generated leads from prospective clients and ensured closures
- Identified and established strategic partnerships
- Organised sales meet with prospective clients and planned & designed their financial portfolio
- Managed funds and tracked finance movement within the organisation
- Established long-term Business Associates, ensured post sales follow-up and maintained customer relations

Notable Attainments:

- Honour of receiving certificate from Zonal Head for achievement of sales target in 2011

Apr'07 - Oct'09 with Kotak Mahindra Bank, Delhi as Assistant Manager

Major Products: Liability Operations

Role Description:

- Resolved customer's queries related to Retail Banking, Retail Assets, Depository & Mutual Funds, Back-end Operations and Administration functions
- Worked as a part of Voucher Audit Team to verify and minimize errors in financial transactions
- Conducted random inspection on the forwarded leads and re-assigned & resolved cases of Siebel ids
- Recorded daily report & internal data and maintained MIS reports daily
- Implemented process & policies rolled out by Process Team and coordinated with them if any variance persists
- Ensured immediate resolution of queries & grievances to maximize client satisfaction levels

Notable Attainments:

- Won Appreciation Award for achieving the sales target in 2008
- Acknowledged for major contribution in reducing the errors in CTI tagging and recording voucher in 2008

Sep'05 - Mar'07 with ICICI Bank, Delhi as Customer Service Officer

Major Products: Asset Operations

Role Description:

- Accomplished high audit results with implementation of standardized procedures in line with all key criteria for accuracy, records management, and sign-off
- Acknowledged as a competent Trouble-shooter; served more than 100 customers daily in a high-pressure bank environment
- Played a key role in devising formal job descriptions for managing each product and trained & substituted staff to the requirements of the job which resulted in reduction of complaint rate from 75% to 30%
- Imparted trainings to new recruits to enhance knowledge base & new skills development of staff which resulted in increased productivity and substantial reduction of work backlogs

Certifications

- AMFI Certification in 2020
- IRDA (Insurance Regulatory Development Authority) Certification in 2020

Academic Details

- Executive Program in Sales and Marketing from Indian institute of management - Calcutta, Batch -11, 2018-2019
- Post Graduate Diploma in Business Management (PGDBM) in Finance from All India Management Association (AIMA) in 2009
- B.Com. Honors from University of Delhi in 2006

Soft Skills

Communicator | Team Builder | Analytical | Collaborator