



## **Job Description**

**Job Title:** Client Relationship Officer(CRO) {Sales}

**Job Summary:**

This job is responsible for giving presentation to walk-in venue clients regarding their financial planning needs. Analyzing financial needs of the customer and suggesting them best available product. Maintaining good relationship with clients and providing timely services. Collecting timely renewals and promoting cross sell and up sell to existing clients.

**KRA:**

- ◆ To give proper financial presentation to all walk in clients on daily basis
- ◆ To provide clients comprehensive financial planning advice with emphasis on L.I. and G.I.
- ◆ To check and collect documents from the clients and also ensure timely issuance of insurance policy
- ◆ To collect premium amount from the clients and timely deposit the same to Operation Executive/ Venue Manger on daily basis
- ◆ To make direct calls and generate business through referencing and corporate clients
- ◆ Provide proper service to clients with relation to any queries related with products offered to them
- ◆ To attend various training programs for development of product knowledge
- ◆ Ensure timely Renewal of all policies of all clients assigned and also do cross selling / upselling to existing clients

**Compensation & Benefits :** Fix salary + attractive incentives + Contests(white goods, foreign trips, domestic trips etc.)

**Technical skills/knowledge required:** Good Communication Skills, Positive Attitude and a Go - Getter

**Desired Skills:** Strong Talkative nature, pleasing personality, Self Motivated