

CURRICULUM VITAE

KEY EXPERTISE

MANAGERIAL:

Strategic Planner with a Vision of development by creative Thinking, Positive approach

Highly competent to meet Senior Management's Expectations by redressing teams for their Professional nurtures and by engaging via Emotional Intelligence

Professional in application of daily objectives & materializing daily assignments preferably via **Non-Verbal Communications**

Expert in Management Info. System (MIS), Sales Audit Process and Working Modules

Ingenious in Multitasking & Adaptable to work under pressure and meeting deadlines

Excellent Analytical Skills creating synergy among teams

Efficient to introduce and showcase potential teammates for their expertise to approach opportunities

Adaptable in Giving and Receiving feedback during periodical review of evolution of self and team

OPERATIONAL:

Expert in customer service with organizational policies & standard

Good in Audit, Analysis and statistics for adoption & adherence

Devising policies/procedures for Development and reducing overall costs to the bank

LANGUAGE PROFICIENCY

Conversant in English, Hindi & Regional language

COMPUTER SKILLS

Well versed with MS applications, conversant in **Mail Writing & Management**, able in working with across OS and Internet



NAVNEET GUPTA

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LinkedIn

FATHER: Late Naveen Kumar (EX-Chief Controller in Indian Railways Jodhpur)
MOTHER: Mrs. Renu Gupta (Retd. Chief Office Superintendent Indian Railways, Jodhpur)
(A Lady with Great Ethics & High Moral)

PROFESSIONAL OVERVIEW

A Strategic leader with a progressive career of 18+ years, providing a vision and direction needed to achieve accelerated and sustained growth whilst decreasing costs. Strong exposure of Customer Service and team management with different organization cultures. Demonstrated versatility of quickly transition in across different Geographical market sectors of Rajasthan and Gujarat.

SOCIAL MEDIA INTRO

I'm a prominent **LinkedIn Influencer**, followed by 6k+ followers while curating and sharing informative posts centered around Trade-Finance and Banking awareness. All my content offers valuable insights with knowledge in dynamic realms of Trade-Finance and Banking. It shines my expertise & making me go-to source for individuals navigating the intricacies of these sectors. I always believe in "Happy to Help" philosophy.

KEY EXPERTISE

- Trainings & Development
- Trade Awareness Program
- Trade Finance Products
- AML/KYC
- Digital Onboarding
- HNI/NRI Banking
- Trade Compliance
- Enhanced Due Diligence
- Portfolio Management

Oct 12 to Jul 15

Jul 15 – Nov 18

Nov 18 – Sep 19

Sep 19 – Feb 23

Feb 23 – Till Present



PRESENT EMPLOYMENT

Presently working in Yes Bank Ltd. at Jodhpur Location as Senior Product Sales Manager (BBTFX) at Asst. Vice President Grade since Feb. 2023 to till present

Present Assignment:

- Working as a Senior Product Manager for all trade customers handling West, North Rajasthan based at Jodhpur handling Clients having Trade Facilities along with Working Capital Teams.

Initiatives & Developments:

- Onboarded first BBTFX customer (self-sourced) with 1.9 Cr. AOC for Rubal-INR transactions with a whopping revenue of 1.5 Cr.+ Revenue till now
- Started First GML account of Rajasthan Region with a series of 8-10 customers in process to onboard
- First Bullion Customer onboarded with PSR limit of 300 Cr. and first transaction of 5 Ton Silver Bars with 14+ Lac revenue booked. This was first PSR Limit across in Zone Rajasthan, Gujarat & MP
- Developed Fund Based book with biggest ever disbursement (Rajasthan) of EPC limit with 35 Cr.
- First Customer onboarded with Loan Against Import (Rajasthan) and many other customers in process to onboard
- Explored WCDL FCY product opportunity in mapped market and developed series of customers
- Disbursed Yes Strike limits (5+ limits in a row) first time since it was launched in entire Zone
- Developed per month business from 25 Lac (seasonal) to 50 Lac (sustainable) revenue per month
- Onboarded highest no. of self-sourced NTB Fund Based Trade customers (across Zone) with total revenue of 1.2 Cr.+ in FY 2023-24 (being among Top 3 PAN India)

SUCCESS MANTRA

"Go Punctual, Be Helpful, Think Creative & Do Accurate"

INTERESTS

Advance Excel & Creative PPTs, Learning & Trainings, Sharing knowledge on Tech & Automobiles

PROF. CERTIFICATION

IRDA (LIFE): A certificate of Domain Knowledge of Life Insurance which enables individual to work in Life Insurance Business to protect the interests of policyholders, regulators, promoters and ensures orderly growth of insurance Industry

AMFI: A certificate of foundational knowledge in derivatives to learn advanced techniques for the use of derivatives in minimizing equity, interest rate, currency & commodity risk; structuring financial portfolios and trading strategies used by individuals and professional money managers

EDUCATION

Master of Commerce (Business Finance & Economics), a two-year full time Master's degree program, emphasized on International Marketing, Financial Management and Export Import Documents, from JNVU Jodhpur, Rajasthan – 2006

Bachelor of Commerce, a three-year full time degree course covering all the aspects of Commerce, Banking & Economics studies in detail, from JNVU Jodhpur, Rajasthan – 2004

PERSONAL DETAILS

Gender : Male
Date of Birth : 25/05/1984
Marital Status : Married
Spouse Profession : Home Maker
Dependents : Wife & Daughter
Location Choice : Open to Discuss

PAST JOB EXPERIENCES

Previously Spearheaded in ICICI Bank Ltd. at Jodhpur Location as Regional Head Sales at Chief Manager-1 Grade (Joined as Manager – II) since Sep. 2019 to Feb. 2023

Profile Synopsis:

- Worked as Regional Head Sales – Affluent Channel (Trade + Wealth) for across mapped geographies (140+ Branches of **West and North Rajasthan**) along with 8 Relationship Managers, 2 Service Manager and 7 Trade Desk Managers (Trade Operations) for 3500+ customer base

Responsibilities:

- Recruitment and Training of Branch and Trade teams for Trade Compliance and Business Development in Portfolio & NTB
- Working for Digital Solutions to customers for their Daily Business needs via Online Products such as Trade OnLine, FX-Online, I-BIZ, CMS Products etc.
- Emerged for solutions towards FOREX products such as Forwards, FCNR & Credit Facilities i.e. EPC, PCFC, FCTL etc.

YES Bank Ltd. Based at Ahmedabad Location as Cluster Sales Leader Business at Asst. Vice President Grade since Nov. 2018 to till Sep. 2019

Responsibilities:

- Responsible for Recruitment, Training and Development of new and existing team of Business Relationship Partners (BRP) for Acquisition of EXIM accounts, High Value Current Accounts
- Initiative taken for a Campaign of Lead Generation from IT Sector Customers involved in Software sales, service and development for cross border countries
- Responsible for TCP (EXIM On-boarding) of customer with coordination of Trade Manager

ICICI Bank Ltd. Based at Jodhpur as Branch Manager at M-1 grade since July 2015 to Nov. 2018

Responsibilities:

- To develop standards of customer service policy for entire Branch, managing a team operating customer service via various profiles such as DBM, CSM, Officers & cross vertical Executives
- Ensuring Compliance adherence, updates of policy adoption and application with records of discussions & correspondence
- Leveraging other cross vertical managers for possible improvements to customer service, Sales & other opportunities
- Responsible for Branch targets of CASA business sourcing and Branch Profit Generation
- Expert in Cross Sale Business from customers for target achievement of team for Business
- Expert in Education of Customers for use of Digital Channels such as Net-Banking, I-Mobile & various modes of applications available at Branch including Insta-Kiosk and CAM

IndusInd Bank Ltd. Based out at Jodhpur Location as Emerging Corporate Relationship Manager (ECRM) at Manager Grade since October 2012 to July 2015

Responsibilities:

- Generate TFX revenue Avenues from mapped portfolio for all Forex & Trade related solutions
- Operated with Trade Operations Managers for daily Trade & FOREX services, Secured Revenue by keeping satisfactory Margins in remittances and book growth of mapped portfolio
- Adhere to work with after Sales Service ensuring Activation of Customer's Account & minimal Depletion through Quality Customers Selection
- To maintain the key relationship with various functional heads of Branch Banking Channels such as Branch Manager, BBG, Sales & other Banking functional concerns for smooth processing of all transactions related to FOREX

PROJECTS UNDERTAKEN

- Working as a core member (PAN India 20 members) of Trade Transformation Project in which we are evolving Digital Platform of Trade processes with best industry practices – Yes Bank
- Task assigned to train new PSMs - BBTFx PAN India with product and processes – Yes Bank

Self-Declaration - I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I undertake to inform you of any changes therein

Navneet Gupta