



Prateek Malhotra  
UBS - 2007



Sheetal Lakra  
IIM Rohtak - 2016



Sunaina Bhat  
Welingkar - 2019



B Srinivas  
IIM Calcutta - 2004



Divya Arora  
KJ Somaiya - 2016



Classroom  
to  
Boardroom!

# My Role: Day in Life of

## Agency

- ❑ Identifying & recruiting right quality advisors to build a strong advisor base
- ❑ Training advisors on products, business processes and selling techniques
- ❑ Assisting advisors in lead generation
- ❑ Ensuring right financial solutions are provided to customers and adherence to business processes and norms
- ❑ Achieving the business target each month on generating new business and advisor recruitment

## Bancassurance / Partnership Distribution

- ❑ Liaising with partner staff and building relationships to maximize the business opportunity
- ❑ Training partner staff about the insurance products and assisting them in revenue generation
- ❑ Guiding branch staff in servicing existing customers, solving queries to ensure quality of business is maintained
- ❑ Exercising due diligence to prevent unauthorized/ fraudulent transactions
- ❑ Achieving the business target each month on generating new business

## Proprietary Sales Force

- ❑ Understanding customer needs and recommending suitable life insurance products
- ❑ Acquiring new clients with the help of leads provided as well as generate fresh leads through cold calling
- ❑ Actively cross sell / up sell products to the company's existing customers and devising new ways of widening customer base
- ❑ Servicing existing customers, solving queries and taking forward complaints with concerned team
- ❑ Achieving the business target each month on generating new business

**ANNUAL GUARANTEED  
PAY: Rs. 2,45,000**

○ Basic	Rs. 73,500
○ Supplementary Allowance	Rs. 1,06,500
○ Provident Fund <sup>1</sup>	
○ Statutory Bonus	Rs. 21,600
○ Gratuity	Rs. 7,000
○ Flexible Compensation Plan	Rs. 3,535
	<b>Rs. 32,865</b>

**BENEFITS**

Mediclaim	Rs. 4,00,000
Group Term Insurance	Rs. 15,00,000
VHCP / Conveyance / Mobile Reimbursement	As per policy

**Performance Linked Sales Incentive**

<sup>1</sup> Provident Fund as a component of AGP refers to employer's contribution to PF