

## CURRICULUM VITAE

**DIANA A. SUSAN**

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### **Objective:**

To obtain a job within my chosen field that will challenge me and allow me to use my education, skills and past experiences in a way that is mutually beneficial to both myself and my employer and allow future growth and advancement

### **A      BRIEF OVERVIEW:**

Over 9 Years' Experience in Banking Operations, Sales, Insurance and all other Banking Products.  
(Being into client relations for 5 years)

Sales-driven, dynamic, positive and results-oriented.  
Hardworking and Goal oriented with a passion in dealing with people.  
Establishing Good customer rapport  
Excellent communication skills.  
Capable of multitasking.

### **B      PROFESSIONAL ACCOLADES**

**Employment Date:** October 2018 - till date

**Designation:** Branch Manager/State Leader

**Company:** Ujjivan Small Finance Bank- Mapusa Goa

#### **Job Profile:**

- Manages & Supervising employees of the branch, responsible for day to day supervision & Leadership
- Recruiting, interviewing and hiring new employees
- Assisting with customer service and satisfaction
- Overseeing branch revenue and growing business
- Overlooking bank operations and Micro-banking department
- To source and ensure get NTB (New to Bank) customers.
- As a ST, attending LDM, SLBC, BLBC meetings

### **Achievements:**

Achieved branch book to 16 cr. in 3 months from the branch launch

Secured highest premium in zone for Life Insurance & General insurance in for the Qtr. 2 & 3 respectively

**Employment Date:** June 2017 - Feb 2018

**Designation:** NRI Relationship Manager- Manager

**Company:** YES Bank- Panjim Goa

**Job Profile:**

- Handling a portfolio of total 295 NRI clients across 5 branches
- Handling a team and ensure sourcing of NTBs
- Servicing their financial needs, and also providing financial decisions as and when required
- Cross sell and sales of value added products and revenue products like LI,GI,MF and Assets
- Making investment portfolio of the customers and helping them to do investments wisely
- To source and ensure get NTB (New to Bank) customers.

**Achievements:**

Got a certificate for exemplary performance in TFX in Quarter 1.

**Employment Date:** September 2015 - June 2017

**Designation:** Personal Banker/Relationship Manager- Deputy Manager

**Company:** Kotak Mahindra Bank- Margao Goa

**Job Profile:**

- Handling a portfolio of total 400 clients out of which 100 NRI clients.
- Servicing their financial needs, and also providing financial decisions as and when required
- Cross sell and sales of value added products, achieved all milestone during the tenure
- To ensure customer service delivery and customer delight at every touch point
- Making investment portfolio of the customers and helping them to do investments wisely
- To source and ensure get NTB (New to Bank) customers.

**Achievements:**

Secured first position in the West zone for a contest launch for sourcing highest WPC in Life insurance and got selected for a trip to IMAGICA Pune.

Secured first position in faceoff of branches for sourcing highest revenue in Insurance in Oct 2016 wherein got a certificate from RBM.

Opened 11 NRE/NRO NTB accounts in a day.

**Employment Date:** May 2014 - August 2015

**Designation:** Agency Development Manager

**Company:** Max Life Insurance Company Limited- Panjim Goa

**Job Profile:**

- Handled a team of 15 agents.
- Identified more potential advisors and recruited them
- Aimed to have a team of highly productive advisors.
- Set targets for the advisors
- Met expected sales target consistently
- Facilitated training, monitored on the development of the advisors
- Ensured customer service at every point of time
- Also handled the operations department.

**Achievements:**

Got certificate for sourcing highest MFYP for the month of September 2015, Also top ADM for highest number of recruitment for July, August, and September 2015.

**Employment Date:** April 2012 - May 2013

**Designation:** Personal Banker- Assistant Manager

**Company:** HDFC Bank Limited- Panjim Goa

**Job Profile:**

- To source and ensure opening of CASA
- Cross sell and sales of other value added products, achieved all milestones during the tenure.
- Cross selling of Bank products including Insurance and Mutual Funds
- To ensure customer service delivery & customer delight at every touch point
- To handle & resolve queries of the walk-in customers.
- Handling a portfolio of Top Priority Customers, managing their accounts
- Making Investment portfolio of customers and helping them to do investments wisely

**Employment Date:** May 2008 - Jan 2012

**Designation:** Clearing department Officer promoted to Front Desk Officer- Assistant Manager

**Company:** Axis Bank Limited- Panjim Goa

**Job Profile:**

- Handling of welcome kits and debit cards issuance
- Issuance of DD/PO
- To handle and resolve queries of the walk in customers
- To ensure customer service delivery & customer delight at every touch point
- Handled clearing department.
- To source and ensure opening of CASA
- Clearing of Inward and Outward cheques
- Clearing of outstation cheques
- Handled cash management services
- Handled conversion of foreign remittances
- Handled NEFT/ RTGS

**C**      **ACADEMIC QUALIFICATIONS**

EXAM	INSTITUTION	YEAR OF PASSING	%	GRADE
Bachelor of Commerce and Economics	Periyar University, Salem	2009	58	Second Class
HSSC	Dempos High Secondary School of Commerce	2006	59	Second Class
SSC	Mary Immaculate Girls High School	2004	59	Second Class

**D      BANKING CERTIFICATIONS**

- Certified AMFI and IRDA

**E      COMPUTER KNOWLEDGE**

- Knowledge of Microsoft Office (Word, Excel and PowerPoint).
- Well versed in Email & Internet environment.

**F      ADDITIONAL COURSES**

**Public Speaking:** Indian Jaycees- Zone 11<sup>th</sup>

Thinking Skills

Crisis Management

General Knowledge

Reasoning Ability

**National Service Scheme** (4 Courses completed):

Fire Prevention and Fire Fighting

Personal Safety and Social Responsibility

Elementary First Aid & Personal Survival Techniques

**G      PERSONAL INFORMATION**

**Date of Birth:** 8<sup>th</sup> October 1988 (Age: 31 Years)

**Marital Status:** Married

**Nationality:** Indian

**Languages Known:** English, Hindi, and Konkani

**H      ABOUT MYSELF**

A Self Starter, Optimist, with a Never-Say-Die-Attitude, who believes in adding value to any work, which is assigned and willing to take added responsibilities. An achiever having good features, pleasant personality with an affable and accommodating nature, very popular among colleagues and friends. Strong analytical and logical skills, effective communication and presentation skills, people management and team building, quick learner.

**I      INTERESTS**

Travelling, Reading, and Listening to Music, Dancing, Sports, and Photography etc.

**J      REFERENCES**

- Mr. Keith Fernandes- Assistant Vice President, Kotak Mahindra Bank, Goa ( Tel: 91 9765553653)
- Mr. Francis Ferrao- Branch Manager, Max Life Insurance Co Ltd ( Tel: 91 9881465055)

**Declaration:** I hereby declare that all the information given above is true to the best of my knowledge and if found incorrect, it shall lead to my disqualification.

**DATE:** 02/01/2020

**DIANA A. SUSA**