



RANJAN KUMAR

CRM Analyst

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🏠 Gurugram

PERSONAL DETAILS

D.O.B (D/M/Y): 08/02/92

Sex: Male

Nationality: Indian

LANGUAGE PROFICIENCY

English

Hindi

TECHNICAL TOOLS

CRM Tools - Followup Boss, Boomtown, Firepoint

Operating system - Windows, MacOS

Financial Research tool - ICICI, SPIDER for technical analysis

Communication Tool - Slack

HOBBIES AND INTEREST

Rhythm Guitarist

Gymming

CAREER OBJECTIVE

To work on ambitious assignments in an environment that nurtures creative professional growth, while being resourceful, innovative and flexible.

EDUCATION PROFILE

- [BBA + MBA (FINANCE)] Integrated from Birla Institute of Technology, Mesra (2014 & 2016) Aggregate: 81.50%.
- HSC from Saint Joseph's School, (ICSE) Bhagalpur, Bihar (2011) Aggregate: 75%.
- SSC from Saint Joseph's School, (ICSE) Bhagalpur, Bihar (2009) Aggregate: 80.14%.

EMPLOYMENT EXPERIENCE

SQUADRUN INC

Feb'2020 - Present

-CRM Analyst

- End to end management of customers from planning to defining project structure , timeline and deliverables, determining tasks and required resources.
- Handled and worked on all CRM tools such as Follow Up Boss, Boomtown, Firepoint.
- Building processes and enhance productivity and improves overall operations health to achieve business goals
- Manage the relationship with the client and all stakeholders and lead quality assurance and manage SLA expectations.
- Worked with the customer success team and creating in-depth CRM Analytics reports.
- Participate in design and architecture sessions with users, internal business & technical teams for building new products.
- Creating SQL for data extraction and building designing dashboards for monitoring purposes.
- Driving data driven decisions by analysing trends, monitoring and reporting regional progress to goals on weekly basis.
- Working in a fast paced environment and coming up with problem solving solutions.
- Prepare and deliver appropriate presentation

TATA AIA LIFE BANCA CHANNEL (INDUSIND BANK)

Oct'2019 - Jan'2020

-Relationship Manager

- Managing BANK teams to create Life Insurance Leads.
- Sales closure calls
- Documentation work
- Dealing in Life Insurance products like:
 - Term plan
 - Traditional plan
 - ULIP Plans
- Creating portfolios of investment for HNI clients.
- Determine financial goals and help in achieving them.
- Use of excel formulas to know financial returns and ways to invest them.

ICICI SECURITIES LIMITED

Aug'2016 - Sept'2017

-Relationship Manager

- Key responsibilities as :
 - Dealing in Stocks, Mutual Funds and Insurance, Corporate Bonds
 - Being an integral part of Investment Strategy
 - Dealing with Client Portfolio Management
 - Cold calling and generating leads
 - Evaluating stock and companies and helping in building portfolio
 - Proficiency in Financial Research tool of ICICI

SOCIAL MEDIA

 /in/ranjan-kumar-88684131

SKILL SET

- Advance Excel, Financial statement analysis, Du pont analysis, Business valuation, Project Valuation, Equity Valuation
- **Financial Modelling projects-**
- Financial modelling for KPIT/idea Cellular. The work involved
 - (a) Understanding Business environment
 - (b) identifying revenue drivers
 - (c) Valuations using the discounted cash flows and relative valuation method
- **Project Finance**
- (a) Assessing the financial feasibility of project related to Port Terminal and a manufacturing Unit.
- (b) Work Involved forecasting the financial statements and using NPV and IRR for evaluating the returns from the projects
- (c) Projects included calculating profitability, Liquidity and Return Ratios of listed companies.
- (d) performed Du pont analysis to understand the effect of Profit Margin, asset turnover.

INTERNSHIP

HCL INFOSYSTEMS

May'2016 - June'2016

- Understanding the concept of WORKING CAPITAL MANAGEMENT and implementing them over multiple in-house projects.

SBI DISCOUNT AND FINANCE HOUSE OF INDIA (DFHI) *May'2015 - June'2015*

- Analyze and understand the complete FIXED INCOME SECURITIES MARKET in depth.

STRENGTHS

- Hardworking, honest and sincere to my work.
- Optimistic, have a "Can do" attitude and drive to succeed.
- Working with a strategic approach.
- A good team player with good communication skills, consistency and flexibility.

CERTIFICATIONS AND ACHIEVEMENTS

- Certified as a NISM Mutual Fund Distributor from NSE.
- Certified in EQUITY AND DERIVATIVE MARKET from NSE.
- Certified as a FITNESS EXPERT from Classic Fitness Academy.
- Participated in Employability Oriented workshop at BIT(2015).
- Part of Cyber Security Workshop at BIT.
- Managed and coordinated in Cognizance computer fest held during all the years of graduation.
- Managed and coordinated as Core Member in BIT extreme 2014 Fest.
- Event Coordinator of Dance team at BIT extreme 2013 Fest.