

IndusInd Bank

Job Description - Banking Partner/Sr Banking Partner - Pioneer Banking

Job title: Banking Partner /Sr Banking Partner - Pioneer Banking

Location: Mumbai

Reports to: Area Manager/ Regional Head- Pioneer Banking

Band: Middle/ Senior Management

Role Details

Relationship Management profile involving acquiring, growing and deepening HNI customer relationships through effective relationship management. Focusing on the analysis and satisfaction of HNI Customers' financial, banking, investment and business needs and objectives.

Provide the face of the Bank to the high net worth customers of the Bank.

Overall Job Description

- ◆ To cross sell wealth & liability products to the banks premium Asset clients
- ◆ Generate new business to achieve defined sales targets
- ◆ Build and deepen relationships with existing Wealth Customers to achieve increase in share of wallet and revenues.
- ◆ Provide professional customer service to achieve a high percentage of customer wallet share and satisfaction leading to client retention and growth.
- ◆ Ensure ongoing self-development.
- ◆ Manage the portfolio to de-risk against attrition and achieve stability of book.
- ◆ Manage the key performance indicators at the highest level.
- ◆ Have complete knowledge of the customer base in terms of the profile, demographics & psychographics and assets in the Bank and in other places.

Sales

- ◆ Achieve the Targets set in terms of product mix.
- ◆ Achieve “best in class” productivity in order to maximize the efficacy of the sales process.
- ◆ Achieve the budgeted cross sell targets.
- ◆ Aggressive Sales call plans to acquire large prospective customers through referrals.
- ◆ Ensure coverage of customer base in accordance with the Group Approved Relationship Matrix.

Integration Management

- ◆ Manage the customer transition with utmost sensitivity.
- ◆ Awareness of all the policies and procedures issued in relation to money laundering prevention.
- ◆ Ensure compliance with these policies and procedures on an ongoing basis.
- ◆ Any suspicious transaction must immediately be reported to the supervising officer.