

About Sahayak Associates

Sahayak Associates is a Wealth Management firm that offers a complete range of solutions to help build, manage and preserve wealth for its clients by executing strategies that maximizes growth and optimizes risk.

At Sahayak, we are determined to offer a seamless customer experience that maintains the highest standards of confidentiality and keeps the interest and financial goals of our customer in mind.

Sahayak Associates comprises a team of experienced Finance Professionals and is one of the fastest growing Wealth Management firm in the region handling more than 500 clients at present.

Job Title: Customer Relations Executive - Insurance

Job Responsibilities

- Provide prompt, accurate, and friendly customer service. This will include providing the most cost-effective comprehensive Insurance coverage to clients.
- Prospect for new business through various channels and follow up warm leads. Shall involve responding to inquiries regarding coverage, policy changes, insurance availability etc.
- Use a customer-focused, needs-based review process to educate customers about insurance coverage/options.
- Hold internal and client facing status meetings, and updates that report on performance, issues, and continuous improvement.
- Create and maintain comprehensive project and client documentation.
- Plan and facilitate client-planning sessions to ensure all contractual obligations are met and performance of client's portfolio is on par with expectations.
- Build strong working relationships with clients, stakeholders, and team members through effective communication throughout the client life cycle.

Job Requirements

- College degree with 2-3 years of experience within the financial management industry: Insurance, Financial Markets etc. Service/Sales experience shall be a plus.
- Have a good understanding of core business concepts related to insurance, IRDAI guidelines and product options.
- Must be a Self-starter with a passion for Goal achievement, positive and enthusiastic attitude.
- Excellent communication, presenting and reporting skills in English language desired
- Expertise in Microsoft Office products especially Microsoft Excel
- Have access to a laptop, personal conveyance and smartphone for work purposes.
- Is willing to work and travel according to the client schedules/ routines.

Additional Information

- Fixed salary/incentive based pay. Looking for someone who is willing to put in extra hours at work to deliver value
- This position does not have standard working hours as timings might change vary based upon client needs.

For more information, please call/email us at:

info@sahayakassociates.in

+91-9872804694, 9530661434



Mr. Sahayak