



# TANYA GUPTA

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## Summary

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Hardworking relationship manager proficient at devising personalized solutions to meet all types of customer demands. Positive and upbeat team player and clear communicator with demonstrated success several years of experience.

## Skills

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- Problem-solving abilities
- Problem Identification
- Decision-Making
- CRM Software
- Sales and Upselling
- Effective Communication
- Product Knowledge
- Active Listening
- Sales expertise
- Teamwork and Collaboration
- High-energy attitude
- Document and Records Management

## Experience

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Tata AIA life insurance | Delhi, IN  
**Relationship Manager -indusInd Bank**  
10/2023 - Current

- Conducted regular client meetings to assess progress, discuss opportunities for growth, and address any concerns.
- Developed and maintained strong relationships with clients to ensure satisfaction and loyalty.
- Identified customer needs, developed customized solutions, and provided knowledgeable advice.
- Developed strategies to attract new customers while retaining existing ones.
- Created financial management mechanisms to minimize financial risk to business.
- Invested funds and recommended appropriate dividend issuances based on historical dividend patterns and expected cash flows.
- Developed or analyzed information to assess current or future financial status of firms.

HDB FINANCE LIMITED | New Delhi ,  
Indian  
**Virtual Relationship Manager**  
10/2022 - 10/2023

- Monitored customer feedback through surveys, polls, and other data sources.
- Collaborated with cross-functional teams to ensure quality of products or services offered to customers.
- Analyzed customer data to identify trends and opportunities for improvement.
- Managed virtual customer relationships, including responding to inquiries and complaints in a timely manner.
- Identified opportunities for process improvements within the organization.
- Evaluated customer needs and proposed specific benefits options.
- Made targeted product and service recommendations based on customer needs.
- Built long-term relationships with lucrative clients by utilizing active

- listening, effective communication and dynamic interpersonal skills.
- Achieved client loyalty through quality, productivity, service and proactive management.
  - Managed portfolio of client accounts, ensuring high levels of satisfaction and loyalty.
  - Established strong relationships with clients through regular, personalized communication.
  - Identified opportunities for cross-selling and upselling financial products to meet clients' objectives.
  - Implemented CRM systems for tracking client interactions and improving service delivery.
  - Led sales planning, development and account management to grow existing accounts and establish new sales accounts.
  - Conducted regular outreach campaigns to maintain existing customers and attract new ones.
  - Created content for promotional materials such as emails, newsletters, and website copy.
  - Developed policies and procedures related to customer service operations.
  - Organized events such as webinars or workshops aimed at engaging customers.
  - Assisted with product launches by providing guidance on marketing efforts, pricing models, and product features.
  - Researched industry trends relevant to the company's target market.
  - Established relationships with influencers who can help promote the brand online.
  - Trained staff members on best practices for managing virtual relationships with customers.
  - Provided technical support to customers via phone, email, or chat applications.
  - Participated in brainstorming sessions for developing innovative solutions for enhancing customer engagement activities.

## Education and Training

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IGNOU | New Delhi  
**M.com** in Master of Commerce  
07/2020

University of Delhi | New Delhi  
**B.com Hnrs** in Commerce  
05/2018

## Languages

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**English:** First Language