Job Title: Business Development Manager – Financial Services

Location: Pune

Job Type: Full-time

Reports To: Head of Investment Operations

Job Overview:

We seek a dynamic and results-driven **Business Development Manager** to join our team. This role focuses on identifying and securing new business opportunities for our investment and insurance solutions and servicing the clients' needs. The ideal candidate will possess excellent communication skills, a good understanding of investment and insurance domain, and a passion for **finding opportunities with prospective clients** fitting our target segment profile and servicing them post conversion. This position will be important in expanding our client base and servicing existing clients

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Key Responsibilities:

- **Lead Qualification**: Qualify and nurture new investment leads to understand their problems /aspirations and related investment needs and objectives. Offer a set of solutions and services to meet clients' best interests.
- **Insurance Sales**: Proactively identify, qualify, nurture Insurance sales opportunities. Position relevant Insurance solution by explaining the products in detail to existing and potential clients. Assist clients with documentation for closing the Insurance sale.
- **Marketing**: Coordinate with the marketing agency to execute targeted campaigns and follow up on inbound leads
- **Follow Through:** Drive the follow up conversations with the interested & nurture customer contacts.
- **Collaboration**: Collaborate with the Investment and Insurance team to develop strategies and materials that support business development efforts.
- **Client Onboarding:** Help in client onboarding by overseeing the KYC and Account opening process on our platform and mandate activation for investment readiness for Mutual Funds
- **Transactions Management:** Manage client financial transactions such as Purchases, redemptions, SWP, and SIP, monitor transactions, and ensure they are executed successfully.
- **Client Queries:** Resolve client queries in collaboration with the Investment Analyst
- **Client Engagement**: Engage existing clients via case studies and company content and new clients by organizing webinars and IAPs in collaboration with the Investment team.
- **Client Referral Program –** Get client referrals consistently.
- **Service Queries and Escalation:** Interact with clients and help resolve their operational and service-related queries with the help of Back-office operations executive
- **Renewals**: Manage timely execution of Insurance renewals and related services.
- **CRM & Reporting**: Maintain accurate records of all interactions with prospects and clients in the CRM system. Generate reports on lead progress, conversion rates, and pipeline health for management review.

Qualifications:

- **Education**: A Bachelor's degree in Business, Marketing, or Commerce is preferred.
- **Experience**: **Minimum 5 years and Maximum 7 experience** in a client-facing role positioning Investment and Insurance Products

Skills & Knowledge

- Excellent verbal and written communication skills, with the ability to build rapport and trust with prospective clients.
- Strong relationship management skills
- Strong Listening and Collaboration skills
- Ability to manage multiple clients in a fast-paced environment.
- Proficiency with CRM software (e.g., Salesforce, HubSpot) and Microsoft Office Suite.
- Good understanding of investment products and familiarity with Insurance products

Personal Attributes:

- Self-motivated, results-oriented, and goal-driven.
- Strong problem-solving abilities and attention to detail.
- Ability to work independently as well as part of a team.
- Enthusiastic, confident, and professional.

Key Performance Indicators (KPIs):

- Total Assets retention
- Monthly SIP book growth
- Client referrals per month
- Number of appointment calls scheduled per week.
- Number of leads qualified per week
- Number of review calls scheduled per week
- Service quality for claims and queries.
- Sales Conversion rate per month for both mutual funds and Insurance

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Why Join Us:

- **Growth Opportunities**: We offer a dynamic and supportive work environment with ample opportunities for career advancement within the company and industry.
- **Competitive Compensation**: Attractive salary and performance-based incentives.
- **Professional Development**: Ongoing training and development opportunities to enhance your skills and knowledge of financial products.
- **Company Culture**: Be part of a collaborative and innovative team that values integrity, discipline, and hard work.

- **Office Location**: In the heart of Pune with world-class facilities and a 50-meter walk from Metro Station.
- **Work / Life Balance:** Our working hours are fixed from 9 am to 5:30 pm, with reduced hours on Saturdays.

To Apply: Please submit your resume and a cover letter outlining your qualifications and interest in the role.