

Shekhar Verma

MBA – Finance & Marketing | EX- HDFC Bank | Ex- Dealsquad

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Professional Summary

Result-driven MBA (Finance & Marketing) professional with experience in banking, CRM processes, financial analysis and consumer behavior research. Skilled in sales strategy, client acquisition, and financial advisory with proven ability to deliver measurable outcomes. Aspiring to leverage consulting and financial services expertise for impactful business growth.

Work Experience

Management trainee (Intern)– HDFC Bank, HOSHIARPUR (Feb – Apr -2025)

- Worked on all the retail products (Mutual funds, CC, Overdrafts etc.) of HDFC Bank.
- Generated revenue of 1.4 million within the portfolio assigned to me and working with the new clients acquisition team
- Improved the NPS rating by 20% for the branch through continuous efforts and focusing on pending issues. Maintaining good relationships with the existing customers and cross selling other products as per customers need.
- Reviewed financial statements, conducted complete cost and revenue analysis, and executed financial reporting using CMA (Cost Management Accounting) principles.
- Conducted in-depth credit risk assessments, financial statement analysis, and due diligence for loan structuring. Prepared comprehensive credit appraisals with the credit managers aligning with regulatory guidelines and risk frameworks.

Intern – Dealsquad (Jul 2025 – Sep 2025)

- Drove both sales initiatives B2B and B2C, aligning solutions with the financial needs of SMEs and educational institutions.
- Conducted in-depth analysis of consumer buying behaviour, generating 8 qualified leads and achieving an 133% in target conversion rates.
- Engaged with students, coaching centres, and training institutes to analyse revenue models, budget allocation, and adoption patterns.
- Delivered actionable insights on pricing strategies and cost optimization, strengthening client financial planning and decision-making.
- Created tailored business proposals for diverse clients, conducting personal meetings to align solutions with client needs.
- Generated 200+ leads and successfully closed 8 deals end-to-end during tenure. Orchestrated various lead campaigns.

Education

- MBA – Finance & Marketing | Jaipuria Institute of Management (2023–25)
- Bachelor of Commerce (B.Com) | CCSU, Meerut (2019–22)

Key Skills & Tools

Skills: Negotiation, Relationship Management, Lead Generation, Pipeline Management, Financial analysis, Statement Analysis, financial risk management, kyc

Tools: Excel, CRM, Google Analytics, Risk Analysis, Credit Rating, Business Valuation, Google Workspace

Achievements

- Completed CRM & PRM study at HDFC Bank, presented to branch management.
- Boosted Dealsquad’s project conversion rate by 18%.
- Achieved 140% of targets during internship at HDFC BANK
- Awarded Best Performer in Sales Simulation during MBA coursework.
- Won second prize in Design thinking competition organized by Jaipuria Institute of Management.