

Shoaib Akhtar

Banking & Financial Services

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💍 Single

Education

Bachelor of Commerce, *Delhi College of Arts and Commerce - University of Delhi*

2021 – 2024
New Delhi

Work History

Virtual Relationship Manager, HDFC Bank

10/2024

Noida

- Managed a portfolio of over 1,200 premium banking customers, ensuring high Noida levels of satisfaction and engagement through regular virtual interactions.
- Provided personalized financial solutions by identifying customer needs and cross-selling suitable banking products, including credit cards, casa, all type of loans, insurance, and investment services.
- Proactively handled customer queries and concerns through calls and emails, ensuring timely resolution and enhancing client experience.
- Maintained strong client relationships by conducting periodic follow-ups, offering updates on new products, and ensuring consistent service quality.
- Collaborated with internal teams to escalate and resolve service-related issues, ensuring seamless customer support.
- Verified, and updated customer documents and information as per regulatory requirements, reducing risk and maintaining up-to-date records.
- Conducted end-to-end KYC (Know Your Customer) verification.
- Conducted face-to-face meetings with high-net-worth clients when required, to understand complex financial needs, offer tailored solutions, and build stronger relationships.

Skills

- Customer Relationship Management
- KYC & Regulatory Compliance
- Cross-Selling & Upselling
- Communication & Telecalling
- Team Coordination
- Banking Product Sales (Loans, Credit Cards, Insurance)
- Customer Query Resolution
- CRM & Core Banking Systems
- Portfolio Handling

Achievement

- Awarded "Best Call Quality" trophy for exceptional customer interaction standards.
- Awarded "Best Customer Experience" trophy for exceptional customer satisfaction standards.

Languages

- English
- Hindi