

PURVI JINDAL

SUMMARY

I am extremely motivated to constantly develop my skills & grow professionally. Expertise in analyzing service trends and optimizing processes for better performance. Strong adaptability to evolving business needs and ability to deliver impactful results. Provided training for newly hired team members, enabling them to quickly adapt to our processes and systems.

SKILLS

Proficient in managing retail branch banking operations, with comprehensive understanding of **risk management, regulatory compliance and audit**.

Key people leader, leading and mentoring the performance of team members to ensure efficiency in process operations and meeting individual & group targets.

Modernization in technology has driven the digital transformation process.

In-depth understanding of all processes connected with Banking Industry including **RBI obligations & guidelines**.

Played key role in **Maintaining KYC Compliance** of all documents.

EDUCATION

B.com
Delhi University (2015-2018)

12th
Aggarwal Public School (2015)

CONTACT

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WORK EXPERIENCE

Branch Relationship Officer-

AXIS BANK LTD. (FEB 2025 – PRESENT)

- Led Branch audits, achieving good ratings & certifications for business contributions.
- Executed comprehensive Customer Due Diligence and Enhanced Due Diligence for newly onboarding clients.
- Successfully handled branch audits, identifying improvement areas & implementing process policies as per guidelines.
- Ensured awareness and adherence to KYC & AML policy, operational risk, and code of conduct, monitoring & reconciliation GL and clearing house accounts.
- Analyzing business needs, strategic direction & identifying initiatives that allowed a business to meet strategic goals.

Service Desk Manager-

INDUSIND (APRIL 2023 – FEB 2025)

- Managing operations of 5 members team, implemented measures to maximize customer's satisfaction by identifying improvement areas and streamlining branch operations resulting in increased efficiency in operation procedures.
- Optimizing branch operations to ensure adherence to risk parameters and monitoring processes, resulted in heightened client satisfaction.
- Monitoring alliance portfolio, facilitated seamless onboarding, and developed strong working relationships to achieve volume, revenue and growth targets.

Sales & Relationship Manager

PNB Metlife Insurance (FEB 2022 – AUG 2022)

- Financial analysis, risk assessment and technical knowledge related to insurance
- Ability to adapt to change and work in a fast-paced environment
- Ability to build and maintain strong customer relationships, manage customer inquiries and resolve customer issues
- In-depth knowledge of insurance

Sales & Marketing Executive

MAX BUPA (MAY 2019 - FEB 2022)

- Worked on customer centric approach
- Worked on resolving issues as per the customer needs
- Answering client queries about product specifications
- Build customer relationships & Public relations