

NEELU TANEJA



CONTACT

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EDUCATION

Master of Science
(Organic Chemistry-1 st Div)
C.C.S. University Meerut in
1999
(Attested Degree available)
Bachelor of Science C.C.S.
University Meerut in 1997

KEY SKILLS

Client Retention
Customer Service
Multitasking Compliance
Sales Operations
Communication
Problem-Solving

PROFILE

A highly motivated professional with extensive experience in client retention, off-boarding management, and sales operations within the financial services and insurance sectors. Recognized for exceptional customer service, I possess strong multitasking abilities, excellent verbal and written communication skills, and a proven track record of meeting deadlines in fast-paced environments. Awarded for my commitment to putting customers first, I am adept at managing compliance processes and delivering tailored solutions that meet clients' needs.

EXPERIENCE

HSBC Bank Middle East (Pact employment) Client Retention Officer July 2018 to July 2020

- Handling customer contacts through a contact plan within the Out-bound team typically on multiple products and or propositions. Provides high quality service to achieve maximum customer satisfaction by providing a solution to an identified need.
- Takes ownership and initiative to complete necessary research and customer follow up or direct the customer to the appropriate department for resolution.
- Deliver fair outcomes for our customers and ensure own conduct maintains the orderly and transparent operation of financial markets
- Handles contacts with our HSBC customers in a polite and friendly way, instilling customer confidence and resolving customer's issues at first contact where possible based on the Campaign and Contact plan provided by RBWM.
- Offers value added products and services based on customer needs analysis provided by the CRM and Business Intelligence teams and ensuring customer understanding of those products.

HSBC Bank Middle East**Working as Off Boarding Manager****December 2016 to December 2017**

- Coordinates off-boarding / client exit process between Relationship Manager (RM) and operation team for closure of accounts, Coordinating with stakeholders with regard to all the dependencies on account (for e.g. credit cards, loans etc.) prior to closure of account.
- Perform all checks prior sending documents to processing team for off board the client. (Any internal transfer, wire transfer, issuance of Demand draft)
- Managing the operational process to exit customers, coordination with internal stakeholders and supporting Relationship Managers.
- Accountable for ensuring Management Information (MI) reporting is delivered to key stakeholders
- Verify the closures done by the operations team with in the service level agreement.
- Mails to RM for any decision pertaining to closure made by the bank.
- Follow up with RM for closure information sent to customer or with any dependencies department.

Metlife Alico Karama Dubai**Working as Sales and Operations agent****March 2016 to Sep 2016**

- Selling of various Insurance product (medical, life, travel etc.) to potential individual and corporate customer.
- Updating the customer detail on Customer data files.
- Perform KYC (Know Your Customer) on individual and corporate clients.
- Good knowledge on usage of world check and external web search to compile details for KYC.
- Escalating any matches to blacklist on World check or any notice from police verification to MLRO.
- Performing complete background checks on customer and the documents before selling the product