



## **BAJAJ ALLIANZ LIFE INSURANCE COMPANY LIMITED**

### **JOB DESCRIPTION**

<b>Role Title</b>	Relationship Manager – Sales Trainee
<b>Function/ Department</b>	Institutional Business (Bancassurance Channel)
<b>Nature of Job</b>	Field Sales

- I. **JOB PURPOSE:** Summarize in one statement why the job exists; and how it contributes to the overall objective of the company.

- To drive insurance business through a key bank partnership by managing sales, operations, and relationships across multiple branches, ensuring high performance, compliance, and customer satisfaction.

#### II. **PRINCIPAL ACCOUNTABILITIES** (Accountabilities associated with the job)

As a Relationship Manager, you will be part of a high-performing team managing our partnership with leading and prestigious banks. This role offers you the opportunity to learn, grow, and contribute to key business outcomes from Day 1.

##### **Key Responsibilities:**

- Build strong working relationships with bank branch teams (across 4–5 branches) to drive insurance sales.
- Promote life insurance products to bank customers through joint field calls and customer meetings.
- Support business growth through new customer acquisition and upselling to existing clients.
- Ensure excellent service delivery and assist in customer retention and problem resolution.
- Collaborate with bank staff to conduct training and product knowledge sessions.
- Track sales performance, generate reports, and share insights with your manager regularly.
- Ensure adherence to company processes and regulatory guidelines in all business practices.
- Interact with High Net-Worth Individuals (HNIs) and provide them with tailored financial solutions.
- Maintain high satisfaction levels among bank partners and customers.

##### **What You'll Gain:**

- Hands-on experience in relationship management and sales.
- Exposure to banking and insurance collaboration models.
- Opportunities to interact with senior professionals and HNI clients.
- Fast-track learning in financial services with mentoring support.

#### III. **Skills & Knowledge**

(Minimum acceptable proficiency for this job which best indicates the education and/or experience requirements of this job and not the incumbent)

##### **Master's /Graduation in business administration or in any stream.**

- Communication in English, Hindi & other Regional Language
- Keen to work in a highly competitive environment.
- Right attitude & never – say- die mind-set.
- Effective planning, time management and organizational skills
- Demonstrated ability to understand customer/partner issues and navigate to an appropriate resolution leveraging business knowledge and technical aptitude.