

*Dynamic professional specializing in relationship management, customer service operations, and supply chain finance, seeking to leverage client engagement, portfolio management, and service delivery expertise to drive business growth*

#### CONTACT DETAILS

✉ [ektakhurana1996@gmail.com](mailto:ektakhurana1996@gmail.com)  
☎ +91 8860495729

#### CORE COMPETENCIES

- Client Relationship Management & HNI Engagement
- Portfolio Management & Review
- Customer Service Excellence & Query Resolution
- Supply Chain Finance Operations & Dealer Account Onboarding
- Digital Banking Adoption & Customer Migration
- Regulatory Compliance & KYC/FATCA/PAN Updation
- Cross-selling & Upselling of Banking Products
- MIS Reporting & Process Optimization
- Service Delivery & Escalation Handling
- Client Relationship Management & HNI Engagement
- Portfolio Management & Review

#### EDUCATION & CERTIFICATIONS

- 📖 **PGPM in Marketing** – ICAI Business School (ICAI), Gurugram, 2018 | CGPA: 8.22/10
- 📖 **BBA** – GLOCAL University, Saharanpur, 2016 | CGPA: 8.60/10
- 📖 **Class XII** – Asha Modern International, Saharanpur, 2013 | 64%
- 📖 **Certifications:**
  - NISM Certification in Mutual Funds
  - IRDA Certification

#### INTERNSHIP

**Trainee & Intern | Maruti Suzuki India Limited (Corporate Office) | Delhi | Feb 2017 – May 2017**  
**Project:** First Time Resolution of Customer Interactions at NEXA Contact Centre  
**Project Area:** Marketing – Customer Relationship Management

- Interacted with customers to assess satisfaction and identify areas for service improvement.
- Supported initiatives to enhance customer experience & streamline contact center processes.

#### PERSONAL DETAILS

- **Languages Known:** English, Hindi & Punjabi
- **Permanent Address:** Gandhi Chowk, Saharanpur-247001

# EKTA KHURANA

## PERSONAL SUMMARY

- **Delivered multi-domain expertise** across Supply Chain Finance Operations and HNI Relationship Management with **6 years of diversified banking experience**.
- **Executed end-to-end dealer lifecycle processes** including onboarding on the SCFM platform, ad-hoc account activation, credential provisioning (maker/checker), query resolution, and account closure.
- **Strengthened client engagement** through exceptional client handling, timely query resolution, and building long-term relationships across high-value customer portfolios.
- **Maintained a 100% same-day task completion approach**, ensuring seamless execution of onboarding, activations, and service requests without workflow backlogs.
- **Enhanced service quality and internal collaboration** through effective teamwork, cross-functional coordination, and adherence to compliance standards (KYC, documentation, internal controls).
- **Supported business and operational decisions** by managing MIS, digital adoption tracking, and operational reporting aligned with supply chain finance & service delivery requirements.

## KEY ACHIEVEMENTS

- **Sparsh Award recipient for 2 consecutive years** for exceptional service delivery.
- **PAN India Rank 3** for KYC updation compliance.
- **Exceeded family grouping ratio targets**.
- **Achieved highest circle-level digital onboarding adoption**.
- **Won India/International trip** incentive by achieving life insurance sales targets.

## WORK EXPERIENCE

➤ **AXIS Bank | Gurugram | Mumbai | Jun'20 – Dec'24**

### Growth Path:

Deputy Manager – Burgundy Service Relationship Manager | Gurugram



Manager – Channel Finance Manager (Supply Chain Department) | Bombay

### Deputy Manager – Burgundy Service Relationship Manager

- **Portfolio Management:** Directed the portfolio of 800+ HNI customers, optimizing servicing and operational efficiency.
- **Regulatory Compliance:** Streamlined processes, ensuring timely updation of KYC, FATCA, and PAN records.
- **Customer Engagement:** Boosted customer-to-grouping ratio for mapped portfolios through targeted engagement strategies.
- **Digital Adoption:** Leveraged digital penetration data to drive customer onboarding via Internet and Mobile Banking.
- **Process Execution:** Executed approvals and remapping workflows efficiently using Online Approval System (OAS).
- **MIS & Reporting:** Generated and maintained dashboards for digital adoption, service requests, and cross-sell performance, enabling informed decision-making.

### Manager – Channel Finance Manager (Supply Chain Department)

- **Dealer Onboarding:** Onboarded dealer accounts onto the SCFM (Supply Chain Finance Management) platform to facilitate credit facility provisioning & streamline financial operations.
- **Ad-Hoc Account Management:** Activated ad-hoc accounts on the SCFM platform to provide temporary credit facilities and ensure seamless financial operations.
- **Credential Provisioning:** Issued online credentials (maker/checker) to clients for SCFM platform access.
- **Query Resolution:** Handled and resolved online queries from users related to SCFM operations.
- **Account Closure:** Managed closure of dealer and ad-hoc accounts efficiently.
- **Service Delivery & Team Support:** Ensured timely execution of daily tasks, including account activations, while assisting team members to achieve targets.

➤ **Senior Relationship Manager | ICICI Securities Ltd. | Gurugram | May'18 – May'20**

- **Client Portfolio & Relationship Management:** Directed HNI client portfolios, drove sales closures, cross-sold financial products, and cultivated long-term client relationships to enhance loyalty and retention.
- **Business Development & Advisory:** Generated new client leads, expanded the HNI customer base, and delivered tailored financial planning and investment advisory solutions.
- **Portfolio Review & Compliance:** Monitored and updated client portfolios, including address changes, nominee updates, and KYC compliance.
- **Campaigns & Initiatives:** Executed corporate engagement campaigns and led strategic client-focused programs, including knowledge sessions and financial planning workshops.
- **MIS & Service Excellence:** Developed and maintained DSR/MIS dashboards and resolved client queries promptly, ensuring high levels of satisfaction and informed decision-making.