

SURABHI PALKAR

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PROFESSIONAL SUMMARY

Results-oriented insurance and customer experience professional with experience across training, customer retention, renewals, sales, service, and financial products. Currently working as a Senior Training Manager with Kotak Life Insurance Co. Ltd., focused on strengthening team capability through structured learning, coaching, product and process training, and performance-oriented development. Recognized for integrity, leadership, adaptability, customer engagement, and the ability to perform effectively in dynamic, target-driven environments.

CORE COMPETENCIES

Training & Development	Team Coaching & Mentoring	Sales & Distribution Training	Customer Experience
Customer Retention & Renewals	HNI Customer Engagement	Product & Process Training	Complaint Handling

PROFESSIONAL EXPERIENCE

Senior Training Manager | Kotak Life Insurance Co. Ltd. | 12 August 2025 – Present

- Lead and manage training initiatives designed to strengthen the capability, productivity, and effectiveness of sales and distribution teams.
- Design and deliver structured onboarding, product, process, sales, and refresher training programs for new and existing team members.
- Coach and mentor frontline teams and managers through classroom sessions, role plays, field support, and performance-focused development.
- Identify capability and skill gaps through performance analysis and implement targeted learning interventions to improve execution and business productivity.
- Drive continuous learning through workshops, product updates, best-practice sharing, and structured knowledge reinforcement.
- Partner with business leaders to align training priorities with business objectives, sales targets, and strategic initiatives.
- Evaluate training effectiveness and provide actionable feedback to improve employee capability, customer engagement, and business outcomes.

Customer Experience Executive | SUD Life Insurance | February 2023 – August 2025

- Managed policy renewals for the Pune–Baramati Region.
- Implemented strategies for securing 13-month renewals during HNI customer visits in collaboration with sales teams.
- Handled policy revivals based on medical and other requirements.
- Managed and processed customer service requests efficiently.

Customer Retention Officer (CRO) | Max Life Insurance Co Ltd | October 2020 – February 2023

- Oversaw the Renewal department for the Pune Region.
- Met HNI clients and coordinated with agents and other channel partners for renewal collection and customer service.

Assistant Sales Manager | HDFC LIFE | October 2019 – September 2020

Insurance Advisor

- Supported claimants in finding insurance coverage suited to their needs.
- Promoted comprehensive insurance coverage based on customer requirements.

Assistant Manager | Kotak Securities Ltd | March 2018 – September 2019

- Sold DEMAT and Trading products and explained relevant services to clients.
- Arranged client meetings and presented product and service offerings.
- Maintained daily sales reports in CRM.
- Reported weekly on calls, meetings, demos, and follow-ups to senior management.

Sales Officer | ICICI Bank Ltd | *November 2016 – February 2018*

- Conducted telephonic calls and customer visits to explain company products and features.
- Arranged meetings with Account Managers and explained services to customers.
- Maintained daily sales reports in CRM.
- Reported weekly on calls, meetings, demos, and follow-ups to higher authorities.

EDUCATION

Master of Business Administration (Marketing Specialization) | Pune University | April 2015 | 61.53%

Bachelor of Business Administration | Kolhapur University | April 2013 | 54%

HSC | April 2010 | 46.50%

SSC | April 2008 | 61.01%

TECHNICAL SKILLS

Salesforce • Life Asia • MS Office • Tally ERP 9

LANGUAGES

Marathi • English • Hindi

PROJECT

Summer Internship Project with Eneergia SKYI Developers – Assessing customer satisfaction of residential property in Pune.

PERSONAL DETAILS

Date of Birth: 31.03.1993 | Nationality: Indian | Marital Status: Married | Gender: Female