

AMIT MANN

Senior BFSI Transformation Consultant | Banking & Insurance Domain Expert | AI & Data Strategy Advisor | Customer Success & Analytics Leader | Marketing Analytics | Business Intelligence | Digital Banking | Business Analysis | Customer Success | Process Excellence | AI-Driven Digital Transformation
Immediate Joiner · Remote / Hybrid / Onsite · India & Global (GCC · UK · US · Europe · APAC)

CONTACT

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OPEN TO

Immediate Joiner

- Remote / WFH
- Hybrid
- Onsite
- Full-Time · Contract

India · GCC · UK · US

Europe · Singapore · Australia

TARGET PROFILES

- Sr. BFSI Domain Consultant
- Banking Domain Consultant
- Insurance Domain Consultant
- Digital Banking Consultant
- Customer Success Manager
- Customer Insights Manager
- Business Analytics Manager
- Lead Data Analyst
- Product Owner / BA Lead

BFSI DOMAIN

- Digital & Core Banking
- Retail & HNI Banking
- Wealth Management
- Bancassurance
- Insurance Distribution
- CASA · Deposits · Lending
- Mutual Funds
- Financial Advisory

ANALYTICS STACK

- Power BI (DAX / Power Query)
- SQL (MySQL)
- Advanced Excel / VBA
- Python (Pandas, NumPy)
- Tableau
- Google Analytics 4
- KPI Framework Design
- Executive MIS Reporting

COMPLIANCE & RISK

- KYC · AML · FATCA · PMLA
- RBI · SEBI · IRDAI
- Audit Readiness
- Risk Governance
- Documentation Control

EDUCATION

B.E. - Electronics & Communication Engg.

PROFESSIONAL SUMMARY

Senior Analytics & BFSI Transformation Consultant with 15+ years of experience delivering enterprise-scale analytics, digital transformation, customer intelligence, and business consulting solutions across Banking, Financial Services, Insurance, and FinTech organizations. Extensive expertise in Customer Analytics, Marketing Analytics, Executive BI, Business Analysis, Customer Success, Digital Banking and Process Transformation.

Proven ability to partner with senior stakeholders, translate business challenges into scalable analytics solutions, lead cross-functional teams, design KPI frameworks, and deliver measurable business outcomes. Strong proficiency in SQL, Power BI, Tableau, Python, AI-enabled analytics, stakeholder management, executive reporting, and enterprise transformation.

KEY ACHIEVEMENTS - QUANTIFIED IMPACT

~30% TAT Cut	Redesigned KYC, CRM and operations workflows for Affluent Banking at IndusInd Bank - HNI onboarding turnaround reduced by 30%.
40+ UAT Defects	Led UAT governance for Finacle and Flexcube core banking upgrades - identified and closed 40+ critical pre-production defects, zero P1 post go-live.
+22% CSAT	HNI Digital Onboarding Transformation at IndusInd Bank - client satisfaction scores improved 22%, zero compliance escalations in first 6 months.
+18% Revenue	Bancassurance digital transformation at Bajaj Allianz × Axis Bank - annual revenue grew 18% YoY across 25 partner branches.
-35% Error Rate	BRD/PRD for SSO-integrated insurance portal - proposal error rate dropped 35% through CRM integration and structured MIS compliance governance.
+20% FCR	First Call Resolution improved 20% at eClerx through RCA-driven process redesign and SQL-based performance dashboards presented to senior leadership.
12 hrs Saved/week	Power BI C-suite dashboards at HDFC Bank and IndusInd Bank eliminated 12+ hours/week of manual MIS reporting, cross-sell hit rate improved 15%.
200+ Enabled	Enterprise-wide digital adoption programs - trained and enabled 200+ banking professionals on CRM platforms, compliance tools and digital workflows.
+12% Acquisition	Digital customer acquisition scaled 12% at Visionaire Technologies via CRM optimization, IVR funnel improvement and conversion scorecard analytics.
12+ BRDs/PRDs	Authored 12+ BRDs, FRDs and PRDs for digital banking, CRM modernization, insurance platforms, workflow automation and onboarding transformation.

CORE COMPETENCIES

BFSI Domain Consulting Retail Banking · HNI/Affluent Banking · Wealth Management · Bancassurance · Insurance Distribution · CASA · Lending · Cards · Priority Banking	Business Analysis & Product BRD / FRD / PRD / SRS · Requirement Gathering · Gap Analysis · User Story Mapping · Customer Journey Mapping · Stakeholder Workshops · UAT Governance
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CERTIFICATIONS

- ▶ IRDAI Insurance Advisor (Active · Certified)
- ▶ AMFI MF Distributor (ARN) (Active · SEBI Backed)
- ▶ MS PL-300 Power BI (In Progress · Q3 2026)
- ▶ PSM I - Scrum Master (Pursuing · 2026)

LANGUAGES

English - Professional
Hindi - Native
Punjabi - Native

IMPACT SCORECARD

BFSI Experience: **15+ Years**
BRDs / PRDs: **12+ Authored**
UAT Defects: **40+ Resolved**
Enterprise Clients: **8+**
Professionals Trained: **200+**
TAT Reduction: **30%**
Revenue Growth: **18% YoY**
CSAT Improvement: **22%**
FCR Improvement: **20%**
MIS Hours Saved/Week: **12 hrs**

Digital Banking & Transformation
HNI Digital Onboarding · CRM Modernization · Customer 360 · Omnichannel Banking · Core Banking (Finacle/Flexcube) · API Workflow Design · Digital Adoption

Customer Success & CX
Customer Lifecycle Management · NPS/CSAT/CES · Customer Health Score · Voice of Customer · Retention Strategy · Escalation Governance · Service Recovery

Performance Marketing
Google Ads · Meta Ads (FB/IG) · LinkedIn Marketing · SEO/SEM · Email Marketing · Content Strategy · GA4 · Funnel Optimization · Conversion Rate Optimization

Analytics & Customer Insights
Power BI (DAX/PQ) · SQL · Excel Macros · Python · Tableau · KPI Frameworks · Revenue Analytics · Customer Segmentation · Churn Analytics · Executive MIS

Delivery & Governance
Agile / Scrum · UAT Planning · JIRA · Process Reengineering · RCA · SOP Design · Workflow Automation · Continuous Improvement

Design & Video Production
Canva · Adobe Photoshop · Pitch Deck Design · Brand Identity · Social Media Creatives · Adobe Premiere Pro · Reels/Shorts · Explainer Videos

ENTERPRISE CONSULTING, ANALYTICS & TOOLS

Digital Banking & Transformation	HNI Digital Onboarding Transformation · CRM Modernization · Customer 360 · Digital Customer Journey Redesign
Business Analysis & Product	BRD / FRD / PRD Authoring · Requirement Gathering · Gap Analysis · Stakeholder Workshops · UAT Governance
Analytics & Executive Reporting	Power BI (DAX, Power Query) · Tableau (working knowledge) · SQL (MySQL) · Advanced Excel/VBA · Python (Pandas, NumPy) · GA4
Customer Success & Experience	Customer Lifecycle Strategy · Voice of Customer · Escalation Governance · Retention Frameworks · Service Recovery
Operational Excellence	Process Reengineering · Root Cause Analysis · Standard Operating Procedures · Workflow Automation · Continuous Improvement
Growth Areas (in progress)	PySpark; cloud/data platforms (GCP, AWS, Azure, Databricks, Snowflake); customer modeling (propensity, CLTV, recommender systems); MMM/MTA/A-B testing — pursuing Microsoft PL-300 (Power BI) and PSM I

PRODUCT CASE STUDIES

Case Study 1 - HNI Digital Onboarding Transformation (IndusInd Bank)

Challenge	Affluent clients faced 5-7 days onboarding TAT due to fragmented KYC, CRM and operations handoffs across siloed teams - creating service friction, compliance risk and low NPS.
My Role	Business Transformation Lead & Domain Consultant - mapped as-is customer journey end-to-end, identified 9 friction points, authored PRD/FRD for unified digital onboarding module. Facilitated stakeholder workshops across IT, Operations and Compliance.
Actions	Governed cross-functional UAT, authored acceptance criteria, designed compliance monitoring dashboard, delivered adoption and coaching program for 40+ Relationship Managers.
Outcome ✓	TAT: 7 days → 48 hrs · CSAT +22% · Zero compliance escalations in 6 months · RM digital adoption 100%

Case Study 2 - Bancassurance Digital Transformation & CRM Integration (Bajaj Allianz × Axis Bank)

Challenge	Axis Bank RMs used 3 disconnected systems for insurance proposals - causing data errors, proposal drop-offs, compliance gaps and a poor bancassurance customer experience.
My Role	Insurance Domain Consultant & Business-IT Liaison - authored BRD/PRD for SSO-integrated insurance portal, defined acceptance criteria, led Agile sprint reviews with IT vendor.
Actions	Coordinated end-to-end UAT across 25 branches, built multi-layer compliance MIS dashboard, designed and delivered change adoption program for 200+ banking professionals.
Outcome ✓	Proposal errors -35% · Revenue +18% YoY · 200+ staff trained and adopted · MIS dashboard adopted by zonal leadership

Case Study 3 - C-Suite Executive MIS & Analytics Platform (HDFC Bank & IndusInd Bank)

Challenge	Senior leadership lacked real-time visibility into RM/branch performance, CASA growth, wealth penetration and insurance KPIs - strategy was delayed by 12+ hours of weekly manual Excel reporting.
My Role	Business Analytics Lead & MIS Manager - designed Power BI dashboards integrating live Finacle and CRM data, built Excel macro models for goal-based financial planning and target tracking.
Actions	Automated weekly and monthly reporting templates, created KPI frameworks with leading and lagging indicators, conducted monthly C-suite analytics briefings, trained stakeholders on dashboard use.
Outcome ✓	12 hrs/week eliminated · C-suite adopted for weekly reviews · Cross-sell hit rate +15% · 100% branch performance visibility

Case Study 4 - Digital Acquisition Funnel & CRM Analytics (Visionaire Technologies & eClerx)

Challenge	Digital sales and service teams had zero data visibility on conversion funnel, CRM effectiveness, call quality and SLA performance - limiting growth and operational efficiency.
My Role	Growth Analytics Lead - built SQL/Excel Pivot conversion scorecards, designed FCR/SLA dashboards, performed Root Cause Analysis, participated in UAT for IVR routing and CRM modules.
Actions	Redesigned CRM scripts using data insights, optimized IVR funnel routing, implemented QA scoring framework, presented monthly performance analytics to senior management.
Outcome ✓	Digital acquisition +12% · Conversion KPIs +10–12% · FCR +20% · SLA compliance maintained · Dashboards adopted

PROFESSIONAL TOOLS & TECHNOLOGIES

Business & Consulting	Analytics & Data	Banking & Technology
Business Analysis	Power BI (DAX, Power Query)	Finacle (Infosys)
Requirement Gathering	SQL (MySQL)	Flexcube (Oracle)
BRD / FRD / PRD	Advanced Excel / VBA Macros	CRM Platforms
Gap Analysis	Tableau	Digital Banking Platforms
Process & Journey Mapping	Python (Pandas, NumPy)	JIRA
Stakeholder Management	KPI Framework Design	Agile
UAT	Google Analytics 4 (GA4)	Core Banking Systems
Customer Journey Mapping	Executive MIS Reporting	Workflow Automation Tools
Change Management	Power Query / ETL	Insurance Proposal Portals

AI TOOLS & EMERGING TECHNOLOGIES

ChatGPT / GPT-4o · Microsoft Copilot · Claude AI · Gemini · GitHub Copilot · Perplexity AI
AI-assisted BRD/PRD drafting · Prompt engineering for analytics automation · AI-powered customer insights · Automated MIS narrative generation · AI content & video creation · AI dashboard storytelling

PROFESSIONAL EXPERIENCE

AVP - Affluent Banking - BFSI Transformation & Digital Banking Consultant (Aug 2024 – Feb 2026).

IndusInd Bank Ltd. · Chandigarh, India

- Acted as embedded analytics/transformation consultant and trusted advisor to Technology, Operations and Compliance leadership — led discovery workshops to redesign HNI onboarding, CRM servicing and digital workflows.
- Designed Power BI executive dashboards giving C-suite real-time visibility into CASA, wealth, insurance, lending and cross-sell performance — translating raw transactional and CRM data into decision-ready KPI frameworks.
- Owned full HNI customer lifecycle analytics on Finacle CRM: portfolio tracking, cross-sell triggers, churn/escalation signals and compliance checkpoints.

- Directed RBI/SEBI/IRDAI/KYC/AML/FATCA risk governance and audit readiness across all client touchpoints.
- Mentored and enabled 40+ Relationship Managers on CRM, onboarding and compliance tooling, driving measurable digital-adoption uplift.

Impact: TAT -30% · CSAT +22% · Executive dashboards automated · Zero compliance escalations.

Senior Manager - Preferred Banking - Analytics & Customer Success Lead (Oct 2023 – Jul 2024)
HDFC Bank Ltd. · Chandigarh, India

- Strategic business-IT bridge - translated system inefficiencies and process gaps into structured FRDs and IT requirement documents for sprint-cycle action by product teams.
- Designed Power BI dashboards and Excel macro models for C-suite MIS, reviewed UAT for digital sales journey upgrades, validated go-live readiness.
- Owned HNI portfolio analytics, goal-based financial planning, cross-sell opportunity modelling, wealth performance tracking and customer health monitoring via Flexcube + CRM.

Impact: 12 hrs/week manual reporting eliminated · Cross-sell hit rate +15% · C-suite MIS adopted

Sr. Cluster Manager - Insurance Domain Consultant - Bancassurance Transformation (Jul 2022 – Oct 2023)

Bajaj Allianz Life Insurance Co. Ltd. · Chandigarh, India (Axis Bank Partnership)

- Led discovery workshops, translated business challenges into analytics requirements, authored BRDs/FRDs, prioritized solution backlogs, and collaborated with technology teams to deliver enterprise transformation initiatives.
- Designed executive MIS dashboards tracking RM productivity, compliance adherence and bancassurance performance - adopted by zonal leadership for monthly reviews.
- Business-IT Liaison for defect resolution and change management - delivered digital adoption training for 200+ banking professionals across the branch network.

Impact: Revenue +18% YoY · Proposal errors - 35% · 200+ trained · MIS adopted by zonal leadership

Customer Success Manager - Bancassurance (Jul 2021 – Jul 2022)

HDFC Life Insurance Co. Ltd. · Panchkula, India (HDFC Bank Partnership)

- Managed strategic bancassurance partnerships, improved digital proposal workflows, customer lifecycle management and compliance governance across HDFC Bank branches.
- Generated Power BI MIS dashboards and automated reporting, authored functional briefs for product launches, coordinated business, IT and training teams.

Area Head - Banking Partnerships - Insurance Domain Consulting (Jan 2020 – Jul 2021)

ICICI Prudential Life Insurance Co. Ltd. · Chandigarh, India (ICICI Bank Partnership)

- Managed bancassurance partnerships, conducted process audits, system gap analysis and workflow improvement recommendations to technology teams.
- Delivered compliance workshops and digital training programs, designed performance dashboards for leadership strategic planning.

Area Head - Customer Acquisition - Digital Banking (Jul 2019 – Jan 2020)

IndusInd Bank Ltd. · Chandigarh, India

- Led digital account-opening transformation, streamlined KYC and AML workflows with IT/Operations, acted as escalation SPOC for onboarding system issues.

Team Manager - Digital Banking Operations - Customer Success (May 2016 – Jul 2019)

HDFC Bank Ltd. · Chandigarh, India

- Led phone banking digital operations and CRM platform management, UAT support and SPOC for system upgrades, MIS dashboards for CSAT and productivity improvement and business intelligence solutions enabling data-driven strategic decisions
- Championed digital adoption and process automation initiatives across the phone banking and customer service channels.

Team Manager - Digital Sales - CRM Analytics - Quality Assurance (Jan 2015 – Mar 2016)

Visionaire Technologies India Pvt. Ltd. · Panchkula, India

- Designed enterprise KPI frameworks, customer analytics dashboards, executive scorecards, improved digital sales KPIs 10–12% via CRM script optimization, participated in UAT for IVR routing and CRM modules.

Senior Analyst - Service Delivery - Business Analytics - Process Excellence (Jan 2009 – Jan 2015)

eClerx Services Ltd. · Chandigarh, India

- Improved FCR 20% via RCA-driven process redesign and SQL performance dashboards presented to senior management.
- Conducted process mapping, requirement gathering and UAT for ticketing, provisioning and escalation management modules, led QA calibration and SLA compliance.