

# Job Description: Head of Cross Sell & Operations

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## Job Title

Head of Cross Sell & Operations

## Location

Sanjaynagar, Bangalore

## Department

Finance

## Reports To

Director

## Job Summary

We are seeking an experienced Finance Manager to join our team in Bangalore. The ideal candidate will have 5–6 years of experience in finance and accounting. This position requires a skilled professional who can manage day-to-day financial operations, oversee financial planning and reporting, and ensure compliance with statutory regulations.

## Key Responsibilities

### 1. Business & Sales Support:

- Manage existing clients and onboard new clients.
- Develop and execute client plans, including:
  - Financial plans
  - Investment strategies
  - Customized acquisition strategies
- Support business expansion by identifying key partnerships and growth opportunities.

### 2. Sales Operations & Compliance:

- Oversee sales workflows and processes for seamless execution.
- Ensure compliance with regulatory requirements (AMFI, IRDAI, Licenses, KRA, etc.).
- Support documentation and approvals for financial products and services.

### **3. Financial & Account Management:**

- Handle revenue tracking, invoicing, and collections.
- Manage cash flow projections and reconciliations.
- Follow up on pending payments and ensure financial compliance.

### **4. Partnerships & B2B Collaboration:**

- Identify and manage new tie-ups with partners.
- Strengthen relationships with existing stakeholders.
- Oversee documentation, agreements, and compliance for partnerships.
- Develop B2B opportunities, including corporate tie-ups and financial wellness programs.

### **5. Deepening of Client Relationship**

- Interact with the existing clients to identify their investment mindset and offer customised solutions
- Strengthen relationships with existing clients
- Cross-sell and up-sell investment products to the existing clients by understanding and identifying their needs
- Responsible for the robust growth of AUM and Revenue from the existing client portfolio

### **6. Strategic Planning & Marketing Support:**

- Assist in the development of new products and services.
- Support corporate strategy and marketing initiatives.
- Collaborate with the marketing team on lead generation, branding, and sales campaigns.

## **Key Skills & qualifications**

- Master's degree in Business, Finance, Marketing, or related field.
- 10-12 years of experience in sales operations, financial planning, or business development in the Mutual Fund / Wealth Management / Insurance industry
- Strong analytical skills and ability to interpret financial data.
- Experience in managing partnerships and compliance documentation.
- Proficiency in CRM tools and sales analytics software.
- Excellent communication, negotiation, and leadership skills.

## Why Join Us?

- Be part of a fast-growing, dynamic company with a collaborative work culture.
- Exposure to strategic business development and sales operations.
- Work with a collaborative team that values innovation and efficiency.
- Opportunity to lead a critical function and shape the future of our sales operations.
- Exposure to cutting-edge sales technology and processes.

If you are a strategic thinker with a passion for sales operations and a proven track record of success, we invite you to apply and be part of our team!