Luis Alberto Rodríguez Cortés
RESPONSABLE COMERCIAL

Responsible for managing investment portfolio of key accounts, and for delivering client-focused solutions based on customer needs, leading the customer account planning cycle and ensuring assigned customers' expectations are met by the company. Proactively leads a joint company- strategic account planning process that develops mutual performance objectives, financial targets, and critical milestones for a one and three-year period. Also in charge of maintaining a strong sales pipeline through effective relationship building, account management and lead generation.

Senior Vice President Institutional Sales – Sura Investment Management México

Since January 16

- Responsible to increase clients portfolio and generate new business with sophisticated products and tools, using a team-based approach to provide holistic solutions to complex financial needs.
- Segment clients within assets allocation.
- Mantain and strength relationship with investment consultants (ie: AON, Mercer, TWO).
- Develop new products for institutional clients and public sector.
- Implement new cross-selling channels strategy for insurance portfolio, private pensions plans (DC & DV), private saving plans.

Client Relationship Management Deputy Director

March 12 - January 16

- Planning and delivering CRM strategies across the company encouraging customer retention and customer loyalty.
- Maintaining and expanding relationships with strategically important large customers, focusing on growing and developing existing clients.
- Planning, successful execution and follow up for investment strategies to ensure customer retention.
- Developing trusted relationships with decision makers and key executives in each account, providing regular value-added engagement with clients.
- Monitoring and maximizing customer lifetime value strategies ensuring maximum profitability and maintaining high customer satisfaction ratings that meet company standard.

Client Relationship Management

December 08 - March 12

- Increase client portfolio AUM's by 300% based on institutional businesses retention and growth.
- Manage investment committees for institutional clients presenting portfolio performance review and investment strategies.
- Working closely with the sales director to provide guidance on how to maximize current and prospective relationships.
- Present business proposals assessing, clarifying, and validating customer needs on an ongoing basis, identifying short and long term growth opportunities. Keeping up to date with market trend and competitor activity.