

Vihaan Menon

Relationship Manager · FICTIONAL SAMPLE
Kochi, India

Summary

Fictional demonstration candidate. All employers, education, projects, achievements and outcomes are illustrative and unverified. Not a real application or licence record. Relationship Manager with an illustrative 11-year career in financial services operations, risk review and customer relationships. Combines relationship planning, needs assessment, service coordination with disciplined documentation, practical coordination and clear communication. The sample career progresses from focused execution to independent workstream ownership, with responsibilities and boundaries described for each appointment. Selected work includes relationship review programme, service escalation improvement and customer information refresh. These examples explain the original problem, individual contribution, deliverables, review approach and remaining limitations rather than relying on unsupported headline claims. Prepared for experienced relationship manager opportunities requiring dependable delivery, thoughtful professional judgement and collaboration. The qualification narrative includes MBA in Financial Services. Every named organisation and outcome in this record is fictional; professional eligibility is not independently established. Turn a clear brief into dependable financial services operations, risk review and customer relationships work: understand the context, apply relationship planning and needs assessment, record the evidence and explain the limitations before handover.

Experience

Relationship Manager - Meridian Financial Operations (fictional)

2024-07 - Present

Independent ownership of scoped relationship manager work, coordinating contributors and making review requirements explicit. Includes the first two selected work examples. Introduced scheduled discovery and service reviews. Created cross-team resolution records. Led brief clarification and prioritised work using relationship planning, needs assessment and service coordination. Raised unresolved constraints before committing to the next stage. Coordinated peer reviews and handover preparation; used a case assessment summary to distinguish completed work, assumptions and follow-up needs. Supported colleagues with practical examples of portfolio reviews and maintained a concise learning record after important assignments. Illustrative career responsibilities. Employer confirmation and underlying work records are not supplied.

Senior Relationship Manager - Northline Financial Operations (fictional)

2020-07 - 2024-06

Owned defined assignments and supported cross-functional coordination. Developed deeper practice in service coordination and portfolio reviews. Coordinated approved documentation updates and follow-up. Translated incoming requirements into a sequenced plan and aligned responsibilities with the project or service owner. Applied documentation and crm to resolve delivery questions while maintaining source and decision notes. Introduced reusable working documents and reviewed exceptions with the responsible specialist rather than silently changing scope. Prepared a reviewed analysis or service record so the next team could understand the work and remaining questions. Illustrative career responsibilities. Employer confirmation and underlying work records are not supplied.

Education

MBA in Financial Services - Asterbridge Institute of Professional Studies (fictional institution)

2013-07 - 2015-05

completed - fictional record
relationship planning needs assessment portfolio reviews
Specialist study on relationship review programme; an illustrative learning project, not a published result.

BBA in Finance - Cedarhaven College of Applied Studies (fictional institution)

2010-07 - 2013-05

completed - fictional record service coordination documentation CRM
Applied coursework in relationship planning, documentation and reviewed practical assignments.

Skills

relationship planning

Applied to relationship review programme through documented preparation, execution and review.

needs assessment

Applied to service escalation improvement through documented preparation, execution and review.

service coordination

Applied to customer information refresh through documented preparation, execution and review.

portfolio reviews

Applied to relationship review programme through documented preparation, execution and review.

documentation

Applied to service escalation improvement through documented preparation, execution and review.

CRM

Applied to customer information refresh through documented preparation, execution and review.

customer communication



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Relationship Manager - Cedarbridge Financial Operations (fictional)

2017-07 - 2020-06

Progressed from supported tasks to independently managed assignments, with review available for unfamiliar or higher-risk decisions. Handled recurring work involving relationship planning and needs assessment using a documented preparation and review process. Supported service escalation improvement by organising inputs, maintaining issue notes and incorporating reviewer feedback. Coordinated colleagues and internal stakeholders using concise status updates, clear questions and agreed next steps. Improved record consistency through customer communication and documented handover expectations. Illustrative career responsibilities. Employer confirmation and underlying work records are not supplied.

Assistant Relationship Manager - Cedarbridge Financial Operations (fictional)

2015-07 - 2017-06

Built practical foundations through supervised assignments, routine documentation and feedback from experienced colleagues. Assisted with relationship planning and service coordination within an agreed scope and escalated unfamiliar work. Prepared inputs and checked completeness before passing work to the responsible reviewer. Maintained task records and learned to communicate assumptions, constraints and observed problems clearly. Applied review feedback to subsequent assignments and developed a dependable working routine. Illustrative career responsibilities. Employer confirmation and underlying work records are not supplied.

Applied to relationship review programme through documented preparation, execution and review.

issue resolution

Applied to service escalation improvement through documented preparation, execution and review.

Certifications

Financial services controls workshop

Meridian Professional Learning Studio (fictional) 2023 continuing learning - not a licence or certification Relationship planning and portfolio reviews in the context of relationship manager work. Used reflective exercises and a bounded practice example related to relationship review programme.

Customer communication practicum

Meridian Professional Learning Studio (fictional) 2024 continuing learning - not a licence or certification Needs assessment and documentation in the context of relationship manager work. Used reflective exercises and a bounded practice example related to service escalation improvement.

Risk analysis case lab

Meridian Professional Learning Studio (fictional) 2025 continuing learning - not a licence or certification Service coordination and crm in the context of relationship manager work. Used reflective exercises and a bounded practice example related to customer information refresh.

Languages

English

professional working - fictional sample

Hindi

professional working - fictional sample



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Projects

Relationship review programme

Fictional internal work programme in financial services operations, risk review and customer relationships; not a real client case study. Problem: Customer needs were handled only through reactive requests. Objective: Create a workable response to this issue through relationship planning, explicit review criteria and practical documentation. Agree the boundaries before execution and retain unresolved points for follow-up. Relationship Manager; owned the stated workstream, not the full organisation or every collaborator contribution. Introduced scheduled discovery and service reviews. Prepared the scope with the commissioning team, identified unresolved inputs and used relationship planning to turn the brief into a sequenced work package. Applied needs assessment and service coordination while coordinating reviews with the designated owner. Kept decision notes so collaborators could separate facts, assumptions and changes. Assembled the handover material, explained open limitations and agreed which items needed further review rather than presenting them as completed. Methods: relationship planning; needs assessment; service coordination; portfolio reviews Deliverables: Relationship review programme - scoped brief; Relationship review programme - reviewed working package; Relationship review programme - handover and learning summary Review: Reviewed the scoped output against the agreed brief, recorded exceptions and checked that key conclusions could be traced to observations. The review package calls for a case assessment summary and a named human reviewer. Illustrative outcome: the team adopted a repeatable approach for relationship review programme, with clearer ownership and reviewable records. This is a fictional qualitative result; no real performance measurement or external acceptance evidence is supplied. Limitations: Synthetic demonstration only. No sample establishes authorisation to sell, advise, underwrite or approve a regulated financial product. No underlying client documents, independently verified measurements or signed approval records are attached.

Service escalation improvement

Fictional internal work programme in financial services operations, risk review and customer relationships; not a real client case study. Problem: Complex queries lacked a single owner. Objective: Create a workable response to this issue through needs assessment, explicit review criteria and practical documentation. Agree the boundaries before execution and retain unresolved points for follow-up. Relationship Manager; owned the stated workstream, not the full organisation or every collaborator contribution. Created cross-team resolution records. Prepared the scope with the commissioning team, identified unresolved inputs and used service coordination to turn the brief into a sequenced work package. Applied portfolio reviews and documentation while coordinating reviews with the designated owner. Kept decision notes so collaborators could separate facts, assumptions and changes. Assembled the handover material, explained open limitations and agreed which items needed further review rather than presenting them as completed. Methods: needs assessment; service coordination; portfolio reviews; documentation Deliverables: Service escalation improvement - scoped brief; Service escalation improvement - reviewed working package; Service escalation improvement - handover and learning summary Review: Reviewed the scoped output against the agreed



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brief, recorded exceptions and checked that key conclusions could be traced to observations. The review package calls for a control and exception register and a named human reviewer. Illustrative outcome: the team adopted a repeatable approach for service escalation improvement, with clearer ownership and reviewable records. This is a fictional qualitative result; no real performance measurement or external acceptance evidence is supplied. Limitations: Synthetic demonstration only. No sample establishes authorisation to sell, advise, underwrite or approve a regulated financial product. No underlying client documents, independently verified measurements or signed approval records are attached.

Customer information refresh

Fictional internal work programme in financial services operations, risk review and customer relationships; not a real client case study. Problem: Outdated information complicated service requests. Objective: Create a workable response to this issue through service coordination, explicit review criteria and practical documentation. Agree the boundaries before execution and retain unresolved points for follow-up. Relationship Manager; owned the stated workstream, not the full organisation or every collaborator contribution. Coordinated approved documentation updates and follow-up. Prepared the scope with the commissioning team, identified unresolved inputs and used documentation to turn the brief into a sequenced work package. Applied crm and customer communication while coordinating reviews with the designated owner. Kept decision notes so collaborators could separate facts, assumptions and changes. Assembled the handover material, explained open limitations and agreed which items needed further review rather than presenting them as completed. Methods: service coordination; portfolio reviews; documentation; CRM Deliverables: Customer information refresh - scoped brief; Customer information refresh - reviewed working package; Customer information refresh - handover and learning summary Review: Reviewed the scoped output against the agreed brief, recorded exceptions and checked that key conclusions could be traced to observations. The review package calls for a reviewed analysis or service record and a named human reviewer. Illustrative outcome: the team adopted a repeatable approach for customer information refresh, with clearer ownership and reviewable records. This is a fictional qualitative result; no real performance measurement or external acceptance evidence is supplied. Limitations: Synthetic demonstration only. No sample establishes authorisation to sell, advise, underwrite or approve a regulated financial product. No underlying client documents, independently verified measurements or signed approval records are attached.



Achievements

Relationship review programme

Introduced scheduled discovery and service reviews. The achievement is the described workstream contribution; independent outcome evidence is not supplied.

Service escalation improvement

Created cross-team resolution records. The achievement is the described workstream contribution; independent outcome evidence is not supplied.

Customer information refresh

Coordinated approved documentation updates and follow-up. The achievement is the described workstream contribution; independent



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outcome evidence is not supplied.

