



VIHAAN MENON

Relationship Manager

relationship planning, needs assessment, service coordination

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FICTIONAL SAMPLE - all employers, qualifications and outcomes are illustrative and unverified.

EXECUTIVE SUMMARY

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.

AT A GLANCE

11 years

ILLUSTRATIVE CAREER

4

CAREER APPOINTMENTS

3

WORK EXAMPLES

2

EDUCATION RECORDS

CORE COMPETENCIES

relationship planning / needs assessment

service coordination / portfolio reviews

documentation / CRM

customer communication / issue resolution

PROFESSIONAL MISSION

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.

Career family: Banking & Insurance | Snapshot: 2026-09-22

PROFESSIONAL EXPERIENCE / RECENT

Relationship Manager

Meridian Financial Operations (fictional)

Jul 2024 - Present | Kochi, India

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)

Jul 2020 - Jun 2024 | Kochi, India

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.

PROFESSIONAL WORKING PRINCIPLES

- Document the customer context and decision authority before recommending next steps.
- Protect financial information and maintain auditable review records.
- Separate analysis from approval and explain missing evidence or model limitations.

PROFESSIONAL EXPERIENCE / EARLIER

Relationship Manager

Cedarbridge Financial Operations (fictional)

Jul 2017 - Jun 2020 | Kochi, India

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)

Jul 2015 - Jun 2017 | Kochi, India

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.

SELECTED CONTRIBUTIONS

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 outcome evidence is not supplied.

SELECTED WORK / 01

Relationship review programme

P1 | Jan 2025 - Jun 2025 | FICTIONAL WORK EXAMPLE

Context. 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.

Contribution and ownership. 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.

Suggested evidence (not supplied): case assessment summary; control and exception register; reviewed analysis or service record.

SPECIALIST PRACTICE

Regulated-service boundary

The sample focuses on relationship planning, needs assessment, service coordination. Approvals, supervision and specialist input are identified in each work package; work outside this scope is referred to the designated responsible person.

Peer learning and practical guidance. Created short examples on relationship planning and portfolio reviews for colleagues. Separated personal preferences from agreed team procedures and recorded useful questions.

Review and handover discipline. Facilitated practical reviews of service escalation improvement, ensuring that unresolved issues retained a named owner rather than disappearing from final presentations.

No sample establishes authorisation to sell, advise, underwrite or approve a regulated financial product.

SELECTED WORK / 02 AND 03

Service escalation improvement

P2 | Jan 2026 - Jun 2026 | Meridian Financial Operations (fictional)

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.

Ownership. 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

Delivered. Service escalation improvement - scoped brief; Service escalation improvement - reviewed working package; Service escalation improvement - handover and learning summary

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.

Suggested evidence (not supplied): case assessment summary; control and exception register; reviewed analysis or service record.

Customer information refresh

P3 | Jan 2021 - Jun 2021 | Northline Financial Operations (fictional)

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.

Ownership. 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

Delivered. Customer information refresh - scoped brief; Customer information refresh - reviewed working package; Customer information refresh - handover and learning summary

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.

Suggested evidence (not supplied): case assessment summary; control and exception register; reviewed analysis or service record.

EDUCATION AND SPECIALIST LEARNING

MBA in Financial Services

Asterbridge Institute of Professional Studies (fictional institution)
Jul 2013 - May 2015 | completed - fictional record
Focus: 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)
Jul 2010 - May 2013 | completed - fictional record
Focus: service coordination, documentation, CRM. Applied coursework in relationship planning, documentation and reviewed practical assignments.

CONTINUING PROFESSIONAL DEVELOPMENT

Financial services controls workshop (2023). 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 (2024). 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 (2025). Service coordination and crm in the context of relationship manager work. Used reflective exercises and a bounded practice example related to customer information refresh.

Provider for these illustrative learning records: Meridian Professional Learning Studio (fictional). Not a licence or certification.

LANGUAGES AND WORKING PREFERENCES

English and Hindi - professional working proficiency in this fictional record.

Work arrangement: hybrid; remote feasibility discussed per role. Relocation: open to discussion - sample preference. Availability: not confirmed; discuss before an interview.

CREDENTIAL AND EVIDENCE STATUS

No sample establishes authorisation to sell, advise, underwrite or approve a regulated financial product.
Synthetic qualification and institution names illustrate profile fields only; they are not a validated qualification route or recognised accreditation claim.
No real referee, endorsement, award, publication, membership or licence is supplied.

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Complete machine-readable data: profile.json. Interactive companion: portfolio.html. Reference CV used for structure only; this is not Ajay Prajapat's biography.