



## PERSONAL DATA

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-  Ian Willis

## SKILLS SUMMARY

- Microsoft Office
- Training Reporting,  
Analysis & Evaluation
- Training Need Analysis &  
Training Facilitating
- Selling skill
- Staff and User Training
- Process Improvement

## AWARDS RECEIVED

-  Best Bancassurance Officer  
2017 at Panindai-Ichilife
-  Diamond Club 2017-2018  
Bancassurance Officer At  
Panindai-Ichilife
- 

# IAN WILLIS

## TRAINER

## PERSONAL PROFILE

Experience Trainer and Financial Consultant, with great knowledge of selling and people development. From analyzing a sales team training needs, developing individuals or group to evaluating and monitoring the impact of training

## WORK EXPERIENCE

### Regional Trainer at Axa Mandiri Financial Services

August 2019 - present

- Conduct day-to-day Training, 2-4 Hours training a day
- Analyzing sales team development needs
- Monitoring individual performance weekly & monthly
- Conduct a Field Observation for sales team in needs
- Achieve specific target for financial advisors and regional branches
- Monitoring AAJI license validity on every financial advisor across all regional branches.
- Create monthly project to help on achieving the sales target

### Retail Funding Officer at Bank Mega

Jan 2019 - August 2019

- Selling Bank Products (Funding) and investment Products
- Manage relationship with New and Existing customer
- Make a weekly sales report that has been done
- Achieve the Target set

### Senior Executive Bancassurance Officer at Panindai-Ichilife (Bancassurance)

August 2015 - August 2018

- Selling unit-linked life insurance products and achieve the targets set
- Maintain relationship with customer
- Make a weekly sales report that has been done

## **WORK EXPERIENCE**

### **Insurance Consultant at Allianz (Bancassurance).**

October 2014 - September 2015

- Selling unit-linked life insurance products and achieve the targets set
- Maintain relationship with customer
- Make a weekly sales report that has been done

### **Financial Service Consultant At Prudential (Bancassurance).**

May 2012 - September 2014

- Selling unit-linked life insurance products and achieve the targets set
- Maintain relationship with customer
- Make a weekly sales report that has been done

### **Marketing & Distribution Staff At PT. Gentayu**

June 2009 - April 2012

- Sending Fruits & Vegetables to Eastern Indonesia
- Preparing the invoice
- To ensure the goods is sent on time
- Monitoring loading process to the ships

## **EDUCATIONAL HISTORY**

### **Master Degree**

Magister Management Universitas Jayabaya

2014 - 2016

GPA 3,65

### **Bachelor Degree**

Marketing Management Universitas Jayabaya

2007 - 2011

GPA 2,6

### **High School**

SMA Perguruan Advent 1 Jakarta

2004 - 2007

Lulus

## **ORGANIZATION EXPERIENCE**

**Member of Himpunan Mahasiswa Ekonomi**  
Universitas Jayabaya  
2008 - 2009

**Member of OSIS**  
SMA Perguruan Advent 1 Jakarta  
2006 - 2007

## **CHARITY EXPERIENCE**

**Sound Engineer At Jakarta Central Church**  
2007 - 2017