

PROFILE STATEMENT

- Was responsible of a client service unit;
- Was accountable for a client service team and a portfolio of client entities, from an operational, financial, risk management and compliance perspective;
- Has a track record of working under pressure to tight deadlines, without compromising on service quality;
- Ability to develop client-base using commercial awareness, relationship building and business acumen;
- Motivated and driven on delivering against business goals to create value in a fast-paced environment;
- Ability to work independently and autonomously whilst being accountable for deliverables;
- Good knowledge of MS Office, Salesforce, Docusign, SICORAX, NAV and World Check;
- Apt to multi-tasking, prioritizing and managing time effectively;
- Ability to identify and escalate matters as and when required;
- Ability to coach, train and develop team members; and
- Excellent interpersonal skills.

EMPLOYMENT HISTORY (2002, 01 July – 2020, 31 August)

Ocorian Corporate Services (Mauritius) Limited ([Homepage](#) | [Ocorian](#))

- Associate Director, Corporate Services (September 2018 to August 2020)
- Manager, Corporate Services (January 2016 to August 2018)
- Manager, Client Relationship (November 2014 to December 2015)
- Manager, Client Development (July 2012 to October 2014)
- Manager (May 2008 to June 2012)
- Assistant Manager (July 2006 to April 2008)
- Senior Consultant (July 2005 to June 2006)
- Consultant (January 2003 to June 2005)
- Assistant Consultant (July 2002 to December 2002)

RESPONSIBILITIES

Enhancing Operational Excellence

- Reported to the COO on all operational aspects of the team's deliverables including effective management of resources and tasks, client relations (onboarding, disengagement, complaints, testimonials), revenue growth through additional services and products offerings;
- Identified, discussed and agreed with Board members, COO and CEO regarding client disengagement processes;
- Ensured that all processes were effectively and efficiently followed and that systems were kept updated at all times;
- Prepared and provided regular progress updates, including detailed reports, dashboard and other tracking information as may be required to the COO.
- Participated in and contributed to management meetings and ensured that actions were implemented within the set deadlines;
- Ensured that team members managed their time as per their chargeability targets/defined job cards for each client;
- Ensured that risk management and compliance guidelines were diligently being followed, including full adherence to Know-Your-Client/Customer Due Diligence requirements for client entities; and
- Assisted in a culture of continuous process improvement by participating in committees to assess and improve the organization's processes, policies and service standards which allowed the organization to acquire an ISO27001 certification and to be fully ISAE 3402 Type 1 and Type 2 Audited.

Ensuring world class client service delivery

- Worked closely with other service lines in the organisation in order to provide a seamless and integrated set of services to the clients in the unit;
- Imparted a culture of excellence in terms of client services to team members;
- Understood and determined customer needs to recommend solutions specific to those needs while exercising discretion in confidential matters;
- Ensured that customer satisfaction and experience were maintained at the forefront in the client service delivery model;
- Responded and resolved customers' concerns using standard procedures and escalating non-standard activities, as necessary;
- Attended meetings with clients and other professional advisers;
- Provided prompt and effective solutions on corporate/fiduciary matters as requested by clients;
- Ensured that the client entities were in compliance with all relevant laws, licensing conditions, regulations and guidelines as issued by the Regulators.

People and Culture

- Assisted the team by respecting coworkers, staying dedicated and keeping everyone up-to-date on the status of daily activities;
- Ensured team's compliance with applicable laws, agreed operational and internal control processes/policies, service standards and best practices;
- Monitored financial and non-financial KPIs of team members so that they meet the relevant operational, risk and compliance targets;
- Carried out performance appraisals and effectively communicated feedback to team members;
- Managed all HR matters in the team with the close collaboration and support of the HR department, including the prevention, management and/or resolution of conflicts;
- Participated in the recruitment process for team members in the Unit;
- Ensured that staff in the unit were motivated and acted according to the values of the company; and

Growing the Business

- Ensured that new clients were brought into the unit in a smooth and seamless manner and that team members were fully engaged in the client take-on process;
- Pro-actively identified cross-selling and up-selling opportunities and come up with value propositions proposals to the existing client base in the unit;
- Acted as a subject matter expert in corporate and fiduciary services with a view to assist and support the business development and sales team when dealing with potential clients; and
- Proactively engaged with clients to understand their business objectives and expansion strategies with a view to propose new structures and services.

Maximising Financial Performance

Ensured that:

- Revenue objectives and profitability margins were achieved on a monthly basis as per the defined target set for each client in the portfolio;
- Cash were collected within the defined deadline and that the process for debt management was strictly followed;
- The margins and ratios set for the unit were achieved as per the defined targets;
- Growth in revenue for the unit through upselling and cross selling of additional products and services;
- Revenue targets for each client were well defined including the revenue potential from out of scope work.

EDUCATION AND QUALIFICATIONS

- Specialised Master in Strategy & Organisation Consulting – ESCP Europe Business School
- Certificate in Offshore Finance and Administration (Merit Grade) – The Chartered Governance Institute, London, UK

ACCOMPLISHMENT STATEMENT

- Hit the annual defined target of USD 3 million at 30 June 2020 for the portfolio;
- Facilitated the listing, for the first time in the sector, of a Global Business Licence entity on the Stock Exchange of Mauritius.
- Assisted a particular client meet a business milestone in the foundation and set up of an African university in Mauritius, the first among a number of other universities to be established on the African continent. Also assisted this client in the application and renewal of around 50 work permits for foreign staff and residence permit for their families.
- Was seconded to a key client's local office and facilitated the process of recovering 5% WHT suffered in relation to dividends payments in China by keeping and maintaining proper records and proving that substance and control were held in the Mauritius entity.

TRAININGS

- Financial Regulation & Compliance
- International Financial Centre (Introduction and Application)
- Combating money laundering and Terrorist Financing
- Coaching staff to succeed and Effective Supervision & Management
- Corporate Governance & Ethics
- Leadership Training for Managers and Feedbacks to drive Business Results
- Dale Carnegie Seminar
- Corporate Etiquette and Communication
- The Dynamics of Effective Communication and Leadership
- SICORAX Performance Management Systems
- The Executive Development Programme
- Accelerated Leadership Development
- Accounting course for Accounts Clerk