

# SHARON ROUSSEAU

Regional Operations Coordinator & Executive Office Manager

## CONTACT



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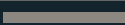


<https://sharon-rousseau.co.za>

## SKILLS

- Operational strategy and process implementation
- Project management and cross-functional collaboration
- Systems implementation and process automation
- HR administration and onboarding workflows
- Office management and facilities coordination
- Data and records management (accuracy, confidentiality, compliance)
- Supplier/vendor and lease contract negotiation
- Client service and CRM system administration
- Internal and external communications
- Event planning, logistics, and budget coordination
- Digital marketing, branding, and content design
- IT and telephony support liaison
- Financial administration and cost optimization
- Training delivery and new staff induction
- Business document drafting and professional correspondence
- Time and task prioritization across dynamic roles
- FSCA representative register maintenance and Fit and Proper tracking and record keeping
- Terms of Business submission and provider management (local and offshore)
- Sub-agent applications, closures, quarterly reconciliations, and client transfer administration
- Platform access coordination and operational record maintenance

## LANGUAGE

English 

Afrikaans 



## PROFILE

Dynamic and detail-oriented Operations Coordinator and Executive Office Manager. Skilled in streamlining internal processes, coordinating cross-functional workflows, and supporting key functions such as onboarding, client transfers, compliance administration, and operational reporting. Known for building strong team relationships, delivering effective training, and enhancing efficiency through practical, solutions-driven approaches. Brings a proactive mindset and a strong commitment to accuracy, professionalism, and client service.



## EXPERIENCE

Jul 2024  
- Present

### Holborn Assets

Operations Coordinator, Africa

#### Operations and Systems Management Expertise

- Manage and update the company SharePoint platform, including company resources, documents, and training materials, as well as maintaining permissions and access for all staff.
- Company website management, including liaising with Head Office IT to maintain and update information on the website.
- Managing expense requests alongside the Finance Department and assisting with budget coordination across Africa offices.
- Design and maintain the company's quarterly internal newsletter, including compliance and company updates, incentives, and insights on company and staff development.
- Develop internal software tools and process enhancements in a personal capacity to digitalize and streamline operations, and improve workflow efficiency, including sub-appointment record-keeping and meeting attendance recording in line with FSCA requirements.
- Create and update internal HR, onboarding, and offboarding processes in line with Head Office HR policies, including employee tracking spreadsheets for payroll, commission tracking, and reporting.

- Produce and distribute internal communications, including compliance, and operational updates.
- Digitalize the company's certification process.
- Design company and individual adviser digital stamps in line with the certification digitalization initiative.
- Lead training and implementation of file encryption and password protection of client data in line with POPIA (Protection of Personal Information Act).
- Facilitate training and provide ongoing support to office liaisons, receptionists, and office managers in their operational roles.
- Train all operational staff across Africa in their roles and responsibilities.
- Manage all office liaisons, receptionists, and office managers, providing ongoing support for operational systems, procedures, and general queries.
- Coordinate business card orders for all advisers in line with company design standards.
- Manage the courier service account, and coordinate courier bookings across administrative teams and departments.
- Prepare reports, presentations, and documentation for internal and client-related use.
- Draft minutes and agendas for scheduled operational meetings.
- Update and maintain company meeting recordings for internal resource purposes.
- Manage printing, telephony, and Wi-Fi accounts across all of the Africa offices.
- Administer general case administration, ensuring company documentation and provider requirements are accurately processed.
- Host monthly team-building events for the Johannesburg office staff.
- Assist in resolving client and staff complaints.
- Act as a liaison for all office rental account management, including obtaining rental invoices, submitting them to the Finance department, processing renewals, etc.
- Design and distribute company incentive flyers and marketing materials for internal and external events.
- Host, arrange, and facilitate budget coordination for provider-sponsored, and internal company events.
- Facilitate induction training events for new providers, including logistics and budget coordination.
- Coordinate recruitment scheduling and follow-up with candidates and recruitment teams.
- Facilitate company charity drives, and obtain internal donations for outreach initiatives.
- Support the Finance department in cost-saving initiatives and operational efficiency projects.
- Managed and updated the company OneDrive platform, including company resources, documents, and training materials.
- Migrated the entire company's shared platform from OneDrive to SharePoint, including reconciliation and updating of compliance documents, administrative resources, sub-appointment materials, training documentation, and marketing resources.

### **Compliance and Regulatory Expertise**

- Administer FSCA register compliance alongside the Compliance Officer, including obtaining and recording Fit and Proper documentation from all Africa-based advisers.
- Liaise with internal and external compliance teams to manage onboarding, ongoing tracking, and offboarding of advisers from the regulatory representative register.
- Track and manage Continuing Professional Development (CPD) records for all advisers in line with compliance requirements.
- Administer and manage sub-appointment processes for all Africa advisers with local and offshore providers, including applications, closures, internal client transfers, and quarterly reconciliations.
- Maintain detailed records of sub-appointments, client transfers, and closures across all providers.
- Manage Terms of Business for local and offshore providers, including application, renewal, reconciliation, and record-keeping, alongside the Compliance Officer.
- Train compliance administrators on all aspects of Terms of Business processes to ensure consistent regulatory adherence, in collaboration with the Compliance Officer.
- Liaise with providers regarding new and ongoing Terms of Business, and coordinate provider training.
- Administer and manage suitable certifier applications for all Africa-based advisers across all offshore providers.
- Design and record digital adviser stamps for all Africa-based advisers in line with digital certification, supporting the verification of client documents.

- Update the company's Professional Indemnity Insurance on an annual basis, alongside the Compliance Officer.
- Administer and manage platform access applications for all Africa advisers across all provider online platforms, including compliance and commissions teams.
- Administer adviser onboarding and offboarding to all company systems, including email distribution groups, access rights, and operational platforms.
- Ensure proper record-keeping of agreements, entity codes, signatories, certifiers, and commission payment bank accounts across all local and offshore providers.
- Created the Terms of Business procedure for internal requests in line with compliance requirements, alongside the Compliance Officer.
- Developed the Compliance Terms of Business review and application process, coordinating with internal compliance, and Group Compliance at Head Office.
- Administer adviser onboarding and offboarding to all company systems, including email distribution groups, access rights, and operational platforms.
- Ensure proper record-keeping of agreements, entity codes, signatories, certifiers, and commission payment bank accounts across all local and offshore providers.
- Created the Terms of Business procedure for internal requests in line with compliance requirements, alongside the Compliance Officer.
- Developed the Compliance Terms of Business review and application process, coordinating with internal compliance, and Group Compliance at Head Office.

**Feb 2022**  
- Present

## **Holborn Assets**

Executive Office Manager

### **Operations Management Expertise**

- Facilitated training and provided ongoing support to office liaisons, receptionists, and office managers in their operational roles.
- Managed all office liaisons, receptionists, and office managers, providing ongoing support for operational systems, procedures, and general queries.
- Managed expenses alongside the Finance Department, and assisted with budget coordination across Africa offices.
- Administered adviser onboarding and offboarding to all company systems, including email distribution groups, access rights, and operational platforms.
- Designed and maintained the company's quarterly internal newsletter, including compliance and company updates, incentives, and insights on company and staff development.
- Facilitated induction training events for new staff, including logistics and budget coordination.
- Developed internal software tools and process enhancements in a personal capacity to digitalize and streamline operations, and improve workflow efficiency, including meeting attendance recording in line with FSCA requirements.
- Acted as a liaison for all office rental account management, including obtaining rental invoices, submitting them to the Finance Department, processing renewals, etc.
- Designed and distributed company incentive flyers and marketing materials for internal and external events.
- Hosted, arranged, and facilitated budget coordination for provider-sponsored, and internal company events.
- Administered general case administration, ensuring company documentation and provider requirements were accurately processed.

### **Office Management – Johannesburg office**

- Oversaw and managed day-to-day office operations, including facilities, agreements, supplier/vendor liaison, and general maintenance.
- Managed front-office functions: reception, cleaning staff, courier services, access control, and parking allocations.
- Handled office procurement (stationery, kitchen, utilities), vendor relationships, and telephony service queries.

- Maintained internal task trackers, performance logs, and office resource records.
- Managed internal office incentives, figures, and target tracking.
- Hosted monthly team-building events for the Johannesburg office staff.

### **Compliance and Regulatory Expertise**

- Administered FSCA register compliance alongside the Compliance Officer, including obtaining and recording Fit and Proper documentation from all Africa-based advisers.
- Liaised with internal and external compliance teams to manage onboarding, ongoing tracking, and offboarding of advisers from the regulatory representative register.
- Tracked and managed Continuing Professional Development (CPD) records for all advisers on the Representative register, in line with compliance requirements.
- Designed and recorded digital adviser stamps for all Africa-based advisers, in line with digital certification, supporting the verification of client documents.
- Updated the company's Professional Indemnity Insurance on an annual basis, alongside the Compliance Officer.
- Managed Terms of Business for local and offshore providers, including application, renewal, reconciliation, and record-keeping, alongside the Compliance Officer.
- Trained compliance administrators on all aspects of Terms of Business processes to ensure consistent regulatory adherence, in collaboration with the Compliance Officer.
- Liaised with providers regarding new and ongoing Terms of Business, and coordinated provider training.
- Administered and managed suitable certifier applications for all Africa-based advisers across offshore providers.
- Ensured proper record-keeping of agreements, entity codes, signatories, certifiers, and commission payment bank accounts across all local and offshore providers.
- Administered and managed sub-appointment processes for all Africa-based advisers, with local and offshore providers, including applications, closures, internal client transfers, and quarterly reconciliations.
- Maintained detailed records of sub-appointments, client transfers, and closures across all providers.
- Administered and managed platform access applications for all Africa advisers across all provider online platforms, including compliance and commissions teams.

**Feb 2022  
– Mar 2023**

### **Holborn Assets**

Human Resources Administrator

#### **Human Resources Expertise**

- Facilitated induction training events for new staff, including logistics and budget coordination.
- Created and updated internal HR, onboarding, and offboarding processes in line with Head Office HR policies, including employee tracking spreadsheets for payroll, commission tracking, and reporting.
- Administered adviser onboarding and offboarding to all company systems, including email distribution groups, access rights, and operational platforms.
- Drafted HR-related documentation, including, but not limited to, contracts, offer letters, salary adjustments, and policy notices.
- Assisted in resolving client and staff complaints.
- Coordinated recruitment scheduling and follow-up with candidates and recruitment teams.

**Nov 2021  
– Jan 2022**

### **Holborn Assets**

Receptionist

#### **Facilities & Office Support**

- Provided general office maintenance support and addressed day-to-day facility needs.
- Processed office-related expense requests and orders.
- Managed service provider accounts related to office support and supplies.
- Front Office & Communication
- Answered and managed the central telephone system, directing calls to the appropriate staff or department.

- Welcomed visitors and clients, maintaining a clean and professional reception area to ensure a positive first impression.

#### **Client Interaction & Documentation**

- Responded to client and internal staff queries via phone, email, and in person.
- Collected and distributed messages for staff, supporting smooth internal communication.
- Arranged certification for client documentation, ensuring proper handling and security.
- Maintained confidentiality of client and company information at all times.
- Resolved client concerns and complaints in a timely and professional manner.
- Organized, maintained, and updated client information and internal records in digital systems.

#### **Scheduling & Coordination**

- Scheduled appointments while balancing staff availability and customer needs.
- Managed the complete process of booking, tracking, and ensuring the secure delivery of packages.
- Coordinated the couriership of client documentation to respective service providers.
- Managed office meeting room bookings for all staff.

#### **General Administrative Support**

- Compiled and distributed weekly office performance figures.
- Assisted with filing, data entry, and administrative support across departments.
- Supported team members and leadership with ad hoc tasks to maintain efficient front-office operations.
- Managed daily reception duties, multitasking in a fast-paced environment while meeting time-sensitive deadlines.

**Feb 2021  
– Oct 2021**

### **Hammond Pole Attorneys**

Data Administrator

#### **Data Entry & Records Management**

- Entered client details, financial notes, and payment information into systems with speed and accuracy.
- Verified that data from various sources was captured accurately and completely.
- Tagged, indexed, and organized data within digital filing systems for ease of access.
- Input handwritten and scanned documents into digital databases.
- Validated and maintained large volumes of structured and unstructured data across platforms.
- Managed spreadsheets used for operational and reporting purposes.
- Monitored data sets for errors, inconsistencies, or duplications, and took corrective action as needed.
- Maintained organized records, files, and audit trails to support internal reporting and compliance.

#### **Administrative & System Support**

- Processed and tracked debtor payments and updated account balances in real time.
- Produced regular reports to assist management and finance teams.
- Updated internal systems for interdepartmental access and review of account and client data.
- Liaised with various teams to gather, organize, and format data for internal reports.
- Ensured compliance with data protection and privacy policies across all tasks.
- Troubleshoot basic system and data queries to maintain data flow and usability.

#### **Operational Accuracy, Reporting & Collaboration**

- Liaised with other departments to confirm payment compliance, settle account queries, and ensure smooth cross-functional workflows.
- Managed large volumes of information while ensuring data integrity across platforms.
- Supported collections, billing, and legal teams in verifying debtor status and documentation.
- Handled high volumes of sensitive data and ensured confidentiality protocols were followed.
- Consistently met performance goals and daily processing targets while adapting to shifting workloads and priorities.

Apr 2020  
- Jan 2021

## Small Business Owner

Self-Employed

### Business Operations & Administration

- Managed all day-to-day operations including opening/closing procedures, scheduling, and workflow coordination.
- Maintained organized digital and physical records including bookings, invoices, and supplier contracts.
- Tracked performance metrics: daily revenue, service breakdowns, and appointment volumes.
- Implemented management software for booking, payments, and client records.
- Sourced new clients through referrals, digital outreach, and promotional activities.
- Maintained and updated CIPC company records.

### Financial Management & Costing

- Prepared monthly budgets, tracked expenses, and managed overhead costs.
- Performed service pricing and margin analysis based on COGS and market positioning.
- Managed accounts payable and receivable, cash flow forecasts, and reconciliations.

### Procurement & Inventory Management

- Sourced and negotiated pricing with suppliers for products and equipment.
- Maintained stock levels and monitored usage to avoid over-purchasing.
- Managed supplier relationships, purchasing cycles, and timely stock delivery.
- Conducted regular stock takes and implemented cost-saving inventory practices.

### Service Design & Product Offerings

- Designed and maintained service menus and pricing lists.
- Researched and introduced new techniques, tools, and high-end product lines.
- Curated retail product ranges (nail care, skincare, accessories) for additional revenue.

### Branding, Digital Marketing & Promotion

- Designed brand identity including visual elements, tone, and customer experience.
- Created brochures, loyalty cards, signage, and digital marketing content.
- Managed presence across Instagram, Facebook, Google, and website platforms.
- Scheduled and published content showcasing services and promotions.
- Ran paid social media ad campaigns and email marketing.

### Client Relationship Management

- Responded to client messages, inquiries, and reviews across digital platforms.
- Delivered personalized client service and managed bookings via online systems and WhatsApp.
- Handled client feedback and resolved service concerns professionally.
- Implemented loyalty programs and tracked customer preferences for tailored experiences.

Jul 2017  
- Mar 2020

## Exley Financial Solutions

Administrator

### Administrative Support & Coordination

- Digitalize and streamlined office operations including customer communications, appointment scheduling, and record-keeping.
- Collected, validated, and distributed key information across departments to support operational continuity.
- Entered and maintained departmental records in the company database with a high level of accuracy.
- Maintained structured filing systems for both personal and professional documentation.
- Oversaw internal calendars and coordinated meetings, team appointments, and business activities.

- Assisted in basic accounting tasks including invoice tracking, reconciliation, and documentation preparation.
- Coordinated general administrative tasks and supported day-to-day office efficiency.

#### Reception & Front Office Duties

- Greeted clients and visitors with professionalism and courtesy, providing information and guidance.
- Answered, screened, and transferred incoming calls; took messages and followed up with internal teams.
- Welcomed clients and managed in-person appointment scheduling and reception.
- Handled document handovers, appointment confirmations, and managed client and supplier communications via phone, email, and in person.

#### Records & Communications Management

- Maintained and updated records of customer communication and delivery tracking.
- Tracked and filed documentation such as correspondence, delivery notes, and internal forms.
- Ensured all documentation was archived according to company standards and confidentiality protocols.
- Provided clerical support in preparing basic reports, meeting notes, and internal communications.

Jan 2015  
- Jun 2019

### PACS Pty Ltd

Personal Assistant to the Chief Executive Officer

#### Data Entry & Records Management

- Entered client details, financial notes, and payment information into systems with speed and accuracy.
- Verified that data from various sources was captured accurately and completely.
- Tagged, indexed, and organized data within digital filing systems for ease of access.
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- Validated and maintained large volumes of structured and unstructured data across platforms.
- Managed spreadsheets used for operational and reporting purposes.
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#### Administrative & System Support

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#### Operational Accuracy, Reporting & Collaboration

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## EDUCATION

**Oct 2022** Personal Assistant to the Chief Executive Officer

**Dec 2025** Regulatory Examinations 1 & 5 (In progress)