



Patrick Jan Faustino

Strategic Leader | Analytics Expert | MBA Candidate

Contact

Phone

+639771229780

Email

faustinopatrickjanlumbera@gmail.com

Address

65 FT Reyes St., San Juan, Malolos City
Bulcan 3000

Education

2018 - present

Master in Business Administration
De La Salle University

2009 - 2012

Bachelor of Science in Business Administration major in Marketing
New Era University

Expertise

- Marketing Strategies
- Data Analytics
- People Management
- Customer Relationship Management
- Sales Forecasting
- Communication Skills
- Project Management
- Process Flows

Awards

2022 | Pru Life UK

Million Dollar Round Table Member

2021 | Pru Life UK

Top 2 Asst Unit Manager

2019 | De La Salle University

Best in Marketing Plan

2015 | Manulife Financial

Top Employee in Quality

Job Experience

Commercial Architect

NTT Data Inc.

August 22, 2023 - December 31, 2023

- Prepare the commercial parts of sales proposals for submission to clients.
- Provide recommendations and review the pricing and costing of deals to ensure maximum benefit and minimum risk
- Build and compile pricing models for specific proposals
- Provide a commercial summary, benefits, internal margin sharing, financial options and assumptions to be consolidated into the client's template.
- Ensure deal profitability by investigating taxation, inflationary movements cost of living issues, etc.
- Evaluate the financing, leasing, and accounting impacts of deals.

Unit Sales Manager & Financial Consultant

Pru Life UK

May 10, 2019 - July 7, 2023

- Setting out relevant plans for the unit.
- Implementing training programs to support skill development and competence. Effective monitoring and evaluation of the sales agents.
- Implementing tools and systems to manage time, activities, and desired results. Careful planning to identify and manage unit goals.
- Administration
- Offering specialized financial guidance and advice.
- Completing financial needs analyses.
- Assessing clients' financial portfolios.

Pricing Analyst

B&M Global Services Manila

November 16, 2017 - December 30, 2020

- Submit pricing condition set up on behalf of the local office for SAP processing
- Review and analyze requests for the correct pricing condition that should be used and is in accordance with the engagement letter
- Ensure that the pricing request does not have and will not have any pricing conflicts with the existing setup
- Contribute to the continuous improvement of the quality of the processes by actively providing feedback on the efficiency of processes and procedures
- Coordinate with stakeholders and local office counterpart/ point person to ensure compliance with the agreed SLA

Strategic Development & Analytics Analyst

Ingram Micro

April 28, 2016 - October 28, 2017

- Process pricing request and generate reports and analysis for vendor line owners, sales associate & counterpart analysts' optimization
- Respond or initiate outbound calls with customers if needed
- Provide clear and precise information to the customer and help them attain the target margin for a specific product
- Prevent customer returns by ensuring the accuracy of solutions provided
- Gather and track data, develop an understanding of market trends & purchasing behavior of customers to support optimization projects



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Commercial Architect

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Job Experience

Premium Analyst

Manulife Financial

January 2, 2014 - February 16, 2016

- Review, analyze, interpret and validate client premium statements received, including balancing the client statements to the payment submitted.
- Gather applicable data, calculate, prepare and complete accounting which includes Journal Entries.
- Reconcile financial statements.
- Allocate client premium payments accurately and in a timely manner on the applicable administration systems.
- Summarize and adjust client premium statements using excel to ensure accurate input on the systems.

Commission Specialist

Manulife Financial

January 2, 2014 - February 16, 2016

- Calculate and verify commissions for the Agents based on predefined commission structures.
- Analyze sales and commission data to ensure accuracy and identify any discrepancies.
- Update the system for Agent and Scale/Rate changes.
- Verify an agent's commissions set up in the system using the forms forwarded by the installers or account associates.
- Compute compensation using flat rates or a designated commission scale.
- Reconcile Commissions if needed due to changes.
- Release compensation to an agent using the administration system.

Travel Claims Associate

Manulife Financial

October 29, 2012 - December 31, 2013

- Validate and administer the records, including claims to provide maximum service to the clients while ensuring the privacy as well as the efficiency and effectiveness of workflow.
- Thoroughly review and assess supporting documentation provided by claimants to validate the accuracy and legitimacy of travel claims.
- Implement quality control measures to maintain a high level of accuracy in claim processing and adhere to established service level agreements.
- Understand and interpret insurance policies or travel coverage to determine the eligibility of claims and ensure compliance with policy terms.

Reference

Veron Estrella

NTT Ltd

Role: HR Director

Email: veron.estrella@global.ntt

Contact #: +63 917 827 0731

Richie Icaro

NTT Ltd.

Role: Sr. Commercial Architect

Email: richie.icaro@global.ntt

Contact #: +63 917 844 3183



Patrick Jan Faustino

Commercial Architect

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Certifications

Basic Spreadsheet Training

Manulife Financial
August 2013

Effective Business Writing

Manulife Financial
December 2014

Business Process Model Notation

Manulife Financial
February 2015

Presentation Skills Training

Manulife Financial
November 2015

Intermediate Excel Course

Ingram Micro
June 2016

SQL Essential Training

Ingram Micro
June 2016

Facilitating Adult Learning

Pru Life UK
October 2021

Digital Photography

New Era University
June 2013

Change Management for Projects

NTT Lts
September 2023

The Salesforce Business Analyst

LinkedIn
January 2024

Career Essentials in Data Analysis

Microsoft & LinkedIn
January 2024

Career Essentials in Business Analysis

Microsoft & LinkedIn
January 2024

Career Essentials in Cybersecurity

Microsoft & LinkedIn
January 2024

Career Bosst with Power BI

Exodus Experts
January 2024

Career Essentials in Project Management

Microsoft & LinkedIn
February 2024