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WORK EXPERIENCE

ATLASSIAN PHILIPPINES INC. | TAGUIG CITY

Enterprise Sales Support | May 2023 - present

- Provisioning cloud licenses after the sales of integrated and hybrid products
- Assist the Accounts Receivables, Revenue and Credit and Collections by answering specific questions about contracts and quotes
- Ensure that contract and quote data is maintained in CRM systems
- Manually create and send order confirmations to customers and channel partners after contracts are completed
- Collaborate with cloud technical support teams, engineers, and Analytics organizations to troubleshoot or update account-specific data
- Create manual sales order and update contract and quote date in NetSuite or other order management software

AXA PHILIPPINES | MAKATI CITY

Licensed Financial Advisor (Life) | May 2022 - present

- Present plans and different products to help clients decide on their financial needs
- Conduct a financial needs analysis for the client using AXA's top-of-the-line financial tools
- Cultivate client relationships. Make a strong connection with clients by guiding them toward financial freedom by assessing their needs and providing solutions
- Prepare financial plans and check their accuracy

THOMSON REUTERS CORP PTE LTD | TAGUIG CITY

Team Manager | September 2022 – May 2023

- Use the PDCA cycle to support continuous improvement within the organization
- Develop a team of Frontline Customer Service Representatives supporting US Legal customers and coach for performance and drive efficiency
- Ensure effortless customer service by coaching and providing feedback to my direct reports regarding areas of improvement and development
- Coordinate discussions with each direct report regarding goal setting, performance reviews, career development planning, and incentive/salary administration
- Manages staffing in accordance with shrinkage
- Daily monitoring of cases

THOMSON REUTERS CORP PTE LTD | TAGUIG CITY

Senior Customer Service Specialist | September 2019 – August 2022

- Facilitated training and onboarding sessions for new Senior Customer Service Specialists
- Conducted mini-workshops for new Customer Service Support
- Provided dedicated support and superior customer service for assigned Premier accounts and key contacts
- Collaborated with the field sales rep, client managers, library maintenance specialists, and other business units to ensure new contracts, billings, subscriptions, swaps, and renewals are handled accurately and according to the terms of the contract
- Acted as business subject matter expert for RealLegal, a court reporting product of Thomson Reuters
- Processed orders, generate invoices, and issue new licenses for RealLegal
- Responded with accurate resolution and superior customer experience to incoming calls and Salesforce cases

THOMSON REUTERS CORP PTE LTD | TAGUIG CITY

Sales and Client Management Support | April 2017 – August 2019

- Provided product and customer support to Thomson Reuters Sales and Client Management organization
- Collaborated with the field sales rep, client managers, library maintenance specialists, and other business units to ensure new contracts, billings, subscriptions, swaps, and renewals are handled accurately and according to the terms of the contract
- Resolved sales incentives issues by analyzing sales data and partnering with the Finance team
- Responded with accurate resolution and superior customer experience to incoming calls and Salesforce cases

THOMSON REUTERS CORP PTE LTD | TAGUIG CITY

Customer Service Support | March 2016 – March 2017

- Interpreted customer contracts, billing, and subscriptions
- Provided assistance to customers with account maintenance requests such as order status, password maintenance, subscription updates, etc.
- Guided customers on their online customer portal by helping them log in seamlessly, walking them through the system, and familiarizing them with the different functions of the tool
- Responded with accurate resolution and superior customer experience to incoming calls and Salesforce cases

QBE GLOBAL SHARED SERVICES | TAGUIG CITY

Team Leader (Domestic and Consumer Credit Insurance) | October 2015 - March 2016

- Oversaw operations and was responsible for establishing and monitoring KPIs and SLAs
- Supervised and mentored Customer Support Officers
- Managed escalated issues and complaints
- Responsible for creating a weekly and monthly business review
- Facilitated weekly business review
- Conducted call calibration and call listening for Net Promoter Survey Calls
- Conducted weekly huddles regarding process updates and refresher
- Conducted call auditing for coaching purposes

- Updated direct reports regarding week-on-week and month-on-month individual stats

QBE GLOBAL SHARED SERVICES | TAGUIG CITY

Senior Insurance Specialist (Consumer Credit Insurance) | July 2014 - October 2015

Previous Position: Insurance Specialist | August 2013 - July 2015

- Provided technical and product support to the team
- Managed escalations and complaints
- Conducted weekly huddles regarding updates and refresher
- Created and conducted knowledge check assessments
- Responsible for handling Mortgage and Loan Protection Insurance concerns
- Updated and processed maintenance on insurance policies
- Responsible for analyzing policies per underwriting guidelines to check eligibility

HINDUJA GLOBAL SOLUTIONS | QUEZON CITY

Customer Care Professional | June 2008 - August 2013

- Handled customer inquiries about product information and complaints
- Processed account maintenance, payments and disputes for card members
- Processed cases that need to be escalated to another department
- Other assignments: Apprentice/Mentor - Assisted new hires with system navigation and helped them familiarize the process
- Received a Balance Performer Awards
- Awarded with Partners Honors Award – an award for significant contribution to providing excellent customer service

ICT GROUP INC | PASIG CITY

English Skills Subject Matter Expert | January 2008 - May 2008

- Facilitated English Skills training for new hires
- Taught new hires the fundamentals of the English language
- Familiarize new hires with the American culture and geography
- Helped new hires neutralize their accents

ICT GROUP INC | PASIG CITY

Relationship Representative | July 2007 – December 2007

- Helped card members look after their credit card accounts
- Processed account maintenance and payments for card members
- Handled customer inquiries about product information and complaints

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ICT GROUP INC | PASIG CITY

Telephone Service Representative | January 2007 – June 2007

- Offered identity theft protection and credit monitoring services for card members

ICT GROUP INC | PASIG CITY

Customer Service Representative July 2005 – December 2006

- Helped card members look after their credit card accounts
- Processed account maintenance and payments for card members
- Handled customer inquiries about product information and complaints

TRAINING AND SEMINARS

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| • CEB Effortless Experience | 2017 | THOMSON REUTERS CORP PTE LTD |
| • Traditional Life Licensing Course (online) | March 2022 | AXA Philippines Makati City |
| • Variable Unit-Linked Licensing Course (online) | March 2022 | AXA Philippines Makati City |
| • NMA and Underwriting Curriculum (online) | March 2022 | AXA Philippines Makati City |
| • Legal and Compliance Curriculum (online) | March 2022 | AXA Philippines Makati City |
| • AXA Basic Course and Financial Need Analysis (online) | March 7-12, 2022 | AXA Philippines Makati City |

EDUCATION

College	2002 - 2006	Philippine School of Business Administration Quezon City Bachelor of Science in Business Administration Major in Marketing and Management
High School	1998 - 2002	La Salle College Antipolo Antipolo City
Grade School	1992 - 1998	La Salle College Antipolo Antipolo City

