






Josh Erskine

Senior Operations Executive | First Class BSc Business Economics

CONTACT

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EDUCATION & QUALIFICATIONS

Chartered Institute for Securities and Investments (CISI)

Introduction to Securities & Investments
2022

BSc Business Economics

First Class
University of Roehampton,
London
2021

SKILLS

// PROFESSIONAL

Improving Efficiency
Teamwork
Time Management
Leadership
Problem-Solving

// TECHNICAL

Economics
Project Management
Microsoft Excel
SQL

SUMMARY

Conscientious, results-driven operations professional working within financial services. Developed and demonstrated excellent analytical, problem solving and collaboration skills throughout my university and working careers. Proven ability to devise operational and service improvements and handle multiple priorities in high-pressure environments. Adding value through a focus on process efficiency.

I am an avid learner with a passion for technology, aspiring to become a junior software engineer. As a result, I have focused my professional development on IT and learning to code. Notable courses completed include MySQL, API's, Python, C# and the .NET Framework. Further to this, I have been completing the CompTIA A+ Certification.

Professional History

Senior Operations Executive

Dec 2022 – Present

Moneybox, London

- Our Investment Operations team's primary point of contact, independently manages our ISA Payments process, focusing on resolving payment anomalies and queries on discrepancies.
- Support training for new team members whilst acting as an escalation contact for complex enquiries.
- Managed and supported the successful delivery of the ISA Transfer In improvements project. Took end-to-end ownership of the market research element of the project and worked closely with Business Architecture to devise a project brief to present to senior stakeholders.
- When required, communicate and provide feedback to other functions and missions around process efficiency and customer interests.
- Deputise for supervisors in their absence and where necessary.

Operations Executive

Aug 2021 – Dec 2022

Moneybox, London

- Manage the transfer process for long-term savings and investment products with other financial institutions.
- Constantly analysing feedback metrics around core products and processes to allow for constant review and optimisation.
- Cross-trained to support essential Customer Operations functions such as AML and Pension Operations.
- Responsible for upholding our high operational standards, focusing on efficiency and customer service.
- Specialised and took ownership of our ISA Payments process and became a point of contact for our cross-team processes.