

Sharon Rousseau

Operations Coordinator, Africa

Dynamic and detail-oriented Operations Coordinator with 4 years of experience in the financial services industry. 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.

Work History

2024-06 -
Current

Operations Coordinator, Africa

Holborn Assets, Sandton

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 certifier access for all Africa advisers across offshore providers, ensuring full compliance with regulatory standards.
- 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.
- 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 offshore providers.
- 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 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.
- Administer and manage platform access applications for all



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Skills

- 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
- Operational strategy and process implementation
- Project management and cross-functional collaboration

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.

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 Africa 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.

- Systems design, digital transformation, and 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

Languages

English

Afrikaans

- Design and distribute company incentive flyers and marketing materials for internal and external events.
- Host, arrange, and facilitate budget coordination for all 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.
- Drafted HR-related documentation, including, but not limited to, contracts, offer letters, salary adjustments, and policy notices.

2022-02 -
2024-05

Office Manager

Holborn Assets, Sandton

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.
- Administered and managed certifier access for all Africa advisers across offshore providers, ensuring full compliance with regulatory standards.
- 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.
- 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.
- 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.
- Administered adviser onboarding and offboarding to all company systems, including email distribution groups, access rights, and operational platforms.

Operations Management Expertise:

- Managed expense requests alongside the Finance Department, and assisted with budget coordination across Africa offices.
- Designed and maintained the company's quarterly internal newsletter, including compliance and company updates, incentives, and insights on company and staff development.
- 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.
- 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.
- 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 all provider-sponsored, and internal company events.
- Facilitated induction training events for new providers, including logistics and budget coordination.
- Administered general case administration, ensuring company documentation and provider requirements were accurately processed.
- Hosted monthly team-building events for the Johannesburg office staff.
- Facilitated training and provided ongoing support to office liaisons, receptionists, and office managers in their operational roles.
- Trained all operational staff across Africa in their roles and responsibilities.
- Managed all office liaisons, receptionists, and office managers, providing ongoing support for operational systems, procedures, and general queries.

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.

Receptionist

Holborn Assets, Sandton, South Africa

Front Office & Facilities Support:

- Managed reception operations, answered calls, greeted clients, and maintained a professional front-desk

2021-11 -
2022-01

environment.

- Handled visitor scheduling, room bookings, and general office upkeep.
- Liaised with service providers and processed office-related supply and expense requests.

Client Interaction & Documentation:

- Responded to client and internal queries via phone, email, and in person.
- Coordinated secure handling and certification of client documentation.
- Maintained confidentiality while updating internal digital records and resolving client concerns professionally.

Coordination & Administration Support:

- Scheduled appointments and managed courier bookings for client documentation.
- Tracked package delivery, compiled weekly office performance figures, and supported team members with general admin tasks.
- Assisted with filing, data entry, and fast-paced front-office duties across departments.

**2021-02 -
2021-10**

Data Administrator

Hammond Pole Attorneys, Johannesburg, South Africa

- 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.
- 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.
- 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.

**2020-04 -
2021-09**

Small Business Owner

Self-Employed, Sandton, South Africa

- Managed daily operations including scheduling, workflows, opening/closing, and record-keeping (digital/physical).
- Oversaw budgets, expenses, cash flow, accounts payable/receivable, reconciliations, and supplier negotiations.
- Maintained CIPC compliance, pricing analysis, and cost-saving inventory practices across stock and purchasing cycles.
- Designed service menus, curated retail ranges, and introduced new products, techniques, and equipment.
- Built brand identity, created promotional materials, and managed social media, website, and Google presence.
- Ran paid ad campaigns, email marketing, and responded to client inquiries, bookings, and reviews.
- Implemented loyalty programs and tracked client preferences to enhance personalized service

2019-05 -
2020-03

Administrator

Exley Financial Solutions, Johannesburg, South Africa

- Administered office operations including communications, scheduling, record-keeping, and filing.
- Coordinated meetings, calendars, and day-to-day administrative tasks to ensure efficiency.
- Handled client reception, appointment bookings, calls, and correspondence with professionalism.
- Collected, validated, and distributed information across departments; maintained accurate databases.
- Managed invoices, reconciliations, and documentation in support of accounting processes.
- Prepared reports, meeting notes, and internal communications; archived all documentation per company protocols.

2015-01 -
2019-06

Personal Assistant to the Chief Executive Officer

PACS Pty Ltd, Johannesburg, South Africa

- Managed the CEO's calendar, correspondence, travel arrangements, and personal errands.
- Coordinated internal and external meetings, prepared briefing notes, and drafted formal business communications.
- Maintained personal and company filing systems, reports, and project-tracking documents.
- Handled confidential tasks, managed household staff, and liaised with service providers.
- Supported logistics for board meetings, events, and special projects.

Education

2022-10

Certificate: Advanced PA's And Secretaries Program

Seven 7 Training - Johannesburg, South Africa

Additional Information

Currently in the process of obtaining RE5 and RE1 certifications, with completion expected by the end of 2025.