

Sharon Rousseau

Operations Coordinator

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.

Additional Information

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

Work History

2024-06 -
Current

Operations Coordinator, Africa

Holborn Assets, Sandton

Compliance & Regulatory Oversight:

- Maintained the FSCA representative register, including Fit and Proper tracking, onboarding and offboarding, CPD records, and closure processes.
- Managed local and offshore sub-agent appointments and terminations in line with FSCA requirements.
- Submitted Terms of Business applications for new providers (local and offshore) and tracked approvals.
- Oversaw client transfer administration across platforms, ensuring compliance with internal and regulatory requirements.
- Conducted quarterly reconciliations of regulatory records and broker codes.

Systems & Process Management:

- Migrated Africa region files from OneDrive to SharePoint, created folder structures, applied access permissions, and maintained document version control.
- Implemented operational tools and internal trackers to improve data accuracy, task ownership, and visibility.
- Coordinated adviser access to internal platforms (e.g., CRM, commissions, compliance systems) and managed role-based permissions.
- Designed and digitalized internal workflows for certification, approvals, and document tracking.

Training & Staff Development:

- Provided operational onboarding and systems training to new hires across Africa, including liaison officers and office managers.
- Trained compliance team on Terms of Business processes and offshore onboarding protocols.
- Maintained onboarding process guides, employee trackers, and internal resource documents.
- Created and maintained onboarding documents, HR spreadsheets, and staff attendance logs.
- Assisted with drafting HR communications and supported the operational rollout of new processes.



Contact

Address

Sandton, South Africa 2128

Phone

+27713034629

E-mail

sharon.rousseau00@gmail.com

Professional Website & LinkedIn

- <https://sharon-rousseau.co.za/>
- <https://www.linkedin.com/in/sharon-rousseau-a35ba312b/>

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

2022-02 -
2024-05

Marketing & Communication:

- Designed the internal company newsletter and regional communications materials.
- Supported adviser-specific marketing events including logistics, branding, and execution.

Project Work & Cross-Functional Support:

- Collaborated with Compliance, Operations, and IT teams to streamline regional workflows.
- Led process digitization and document standardization projects.
- Supported internal charity drives and coordinated regional logistics.

Office Manager

Holborn Assets, Sandton

Operations & Office Management:

- Oversaw day-to-day office operations including facilities, lease 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.

Compliance & Regulatory Oversight:

- Submitted and followed up on Terms of Business applications for both local and offshore providers.
- Managed adviser Fit and Proper documentation and coordinated onboarding/offboarding procedures.
- Administered sub-agent appointments, closures, and reconciliations.
- Facilitated accurate client transfers across platforms and brokerages.

Systems & Process Management:

- Led digitization of operational forms, checklists, and processes.
- Oversaw implementation and reconciliation of telephony systems.
- Maintained admin, compliance, and operations registers for reporting and audit purposes.

HR & Admin Support:

- Drafted employment contracts, offer letters, and HR communications.
- Managed onboarding/offboarding checklists, staff documentation, and liaised with payroll vendors.
- Supported updates to SharePoint, Teams, and internal communication channels.

Marketing, Events & Internal Communication:

- Planned and executed staff functions, team-building events, and provider-hosted activities.
- Designed internal event branding and communication materials.
- Coordinated recruitment drive logistics: venues, travel, and materials.
- Drafted and distributed internal reports, newsletters, and meeting agendas.
- Managed event budgets and supplier coordination.

Receptionist

Holborn Assets, Sandton, South Africa

- 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

2021-11 -
2022-01

Front Office & Facilities Support:

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

Data Administrator

Hammond Pole Attorneys, Johannesburg, South Africa

Data Entry & Records Management:

- Captured client, payment, and financial data from various sources with speed and accuracy.
- Input and organized structured and unstructured data into digital systems; maintained tagging, indexing, and filing for easy access.
- Monitored data for errors, performed validations, and maintained audit trails to support reporting.
- Processed debtor payments, updated balances in real time, and generated reports for management.

Administrative & System Support:

- Updated internal systems and spreadsheets for interdepartmental use; ensured data compliance and accuracy across platforms.
- Liaised with multiple teams to compile data for internal reports, resolve account queries, and troubleshoot system issues.
- Ensured confidentiality while managing high data volumes and supporting collections, billing, and legal teams.

Performance & Collaboration:

- Consistently achieved processing targets while adapting to changing workloads.
- Maintained data integrity and upheld privacy policies in a fast-paced, high-volume environment.

Small Business Owner

Self-Employed, Sandton, South Africa

Operations & Administration:

- Managed daily business operations including scheduling, recordkeeping, and workflow coordination.
- Maintained digital records (bookings, invoices, contracts) and updated CIPC registration.
- Tracked revenue, appointment volumes, and service metrics using salon management software.
- Sourced clients through referrals, promotions, and digital outreach.

2021-02 -
2021-10

2020-04 -
2021-09

Financial & Inventory Management:

- Prepared budgets, tracked expenses, and managed cash flow, pricing, and margins.
- Oversaw stock control, supplier negotiation, and cost-saving procurement practices.
- Conducted stock takes and ensured timely product delivery and inventory accuracy.

Service Design & Retail Branding & Marketing:

- Designed service menus, researched techniques, and introduced premium product lines.
- Curated and sold retail items (nail care, skincare, accessories) to diversify income.

Client Service:

- Developed full brand identity and marketing assets (brochures, loyalty cards, signage).
- Managed content and campaigns across social media and digital platforms.
- Ran paid ads and email marketing; responded to online inquiries and reviews.
- Delivered tailored client service via WhatsApp and booking systems.
- Resolved service concerns and implemented loyalty programs to boost retention.

2019-05 -
2020-03

Administrator

Exley Financial Solutions, Johannesburg, South Africa

Administration & Office Coordination:

- Streamlined scheduling, communication, and internal record-keeping processes.
- Maintained accurate departmental databases, filing systems, and calendars.
- Supported daily office operations including basic accounting (invoicing, reconciliations) and meeting coordination.
- Facilitated internal information flow and ensured document handling followed confidentiality protocols.

Reception & Client Support:

- Greeted clients, answered calls, managed front-desk reception, and scheduled appointments.
- Coordinated client and supplier communication via phone, email, and in person.
- Handled incoming/outgoing documentation, message routing, and internal delivery tracking.

2015-01 -
2019-06

Personal Assistant to the Chief Executive Officer

PACS Pty Ltd, Johannesburg, South Africa

Executive & Personal Support:

- Managed the CEO's calendar, correspondence, travel arrangements, and personal errands.
- Coordinated internal/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

Advanced PA's And Secretaries Program

Seven 7 Training - Johannesburg, South Africa