

# Adeline Lee

📍 City, Country

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## Professional Profile

Offers extensive experience with a broad portfolio of transferable skills that support ongoing work-streams and operational activity across a range of professional functions and busy organisational contexts. An eye for detail, excellent communication and planning skills, and detailed understanding of software underpin the ability to complete tasks and solve problems accurately, comprehensively and on time.

A positive and pragmatic team member, who uses excellent interpersonal skills and a natural understanding of others in order to manage relationships with colleagues, customers and managers, while also being comfortable working autonomously. Highly adaptable, and very much enjoys the challenge of addressing new situations, targets and timescales, with the ability to balance multiple workstreams and priorities concurrently. Never complacent, and consistently seeks out opportunities for continuing personal and professional development. Above all, prioritises an ethos of integrity, quality of service provision and a commitment to hard work.

## Competencies

Customer Service • Documentation Management • Information Governance • Organisational Administration • IT Skills (MS Office; Various accounting software packages such as Sage) • Management of Financial Transactions

## Career Summary

2000 – Present

### Customer Service Analyst

*Company Name*

*City, Country*

#### KEY ACHIEVEMENTS

- Achieved a 97% satisfaction rating on the service users' survey by collaborating with colleagues to ensure high levels of customer service standards despite staff shortages
- Passed probationary period within half the allotted timeframe by documenting work processes and attending virtual training sessions

#### RESPONSIBILITIES

- Manage internal and external customer databases in accordance with the principles of information governance
- Assess, prioritise and address telephone calls, e-mails and requests for support received from customers
- Maintain up-to-date knowledge of customer business areas

2000 – 2000

### Client Service Administrator

*Company Name*

*City, Country*

#### KEY ACHIEVEMENTS

- Contributed to improved efficiency by 30% by providing temporary support to another department with staff shortages
- Achieved 95% on audit checks conducted on a range of work processes including quality and accuracy of documentation provided to external stakeholders
- Received positive feedback on account of exceptional service provision in processing a Group scheme renewal for a top-priority client

#### RESPONSIBILITIES

- Processed death and income protection claims under clients' Group life assurance and income protection schemes
- Identified and retrieved missing premia owed to the company

- Liaised with insurers to ensure timely and accurate delivery of scheme documentation
- Facilitated training for new employees and compiled guidance notes on claim-handling processes
- Ensured that client and claim information held on software and systems was maintained securely and confidentially
- Responded to queries and requests received from clients and insurers

2000 – 2000

**Data Support  
Advisor /  
Administrator**

*Company Name*  
*City, Country*

KEY ACHIEVEMENTS & RESPONSIBILITIES

- Awarded certificate to recognise efficiency in fixing pension submission errors
- Taught 300 clients how to use company's bespoke software platform
- Supervised and allocated work to a team of four handling the administration of contribution schemes such as workplace pensions and auto-enrolment
- Managed and maintained data received from clients, including carrying out reconciliations and rectifying discrepancies in employee and employer contributions and missed collections
- Provided administrative support to client relationship managers supporting the company's biggest clients
- Updated managers and clients with progress on various workstreams

2000 – 2000

**Funds Transfer  
Officer**

*Company Name*  
*City, Country*

KEY ACHIEVEMENTS & RESPONSIBILITIES

- Processed a range of transactions accurately and promptly, including
  - external and internal fund transfers
  - Society for Worldwide Interbank Financial Telecommunication (SWIFT) network transfers
  - reimbursements, foreign currency tickets and of all sundry transactions
- Carried out reconciliations of general ledgers

2000 – 2000

**Client Support  
Administrator-  
Retirement Income**

*Company Name*  
*City, Country*

KEY ACHIEVEMENTS

- Resolved over 80 calls and queries received daily from clients
- Achieved an appreciation acknowledgement in recognition of volunteering to take minutes of team meetings and publishing recordings accurately and in a well-presented format
- Trained two new temporary employees on retirement quotation processes, enabling them subsequently to become substantively employed
- Processed and recorded retirement quotations and manual calculations on funds held in members' policies, such as entitled tax-free cash amounts

## Education & Professional Development

2000 – 2000

**AAT**  
Level 3  
*Association of Accounting Technicians*

2000 – 2000

**Accounting AAT Foundation Certificate**  
Level 2 • Distinction  
*Association of Accounting Technicians*

2000 – 2000

**Computerised Accounts (Sage Line 50)**  
Level 1 • First Class  
*Institution Name • City, Country*

2000 – 2000

**B.Sc. (Hons): Economics**  
*Institution Name • City, Country*

## Personal Interests

Current Affairs • Travel • Cookery • Reading