

My Services

Database Management:

- Inputting and updating policyholder information accurately in databases.
- Keeping client databases updated and accurate.

Spreadsheet Creation and Analysis:

- Drafting, editing, and managing documents and related materials.
- Preparing presentations.

Standard Operating Procedures (SOPs):

- Developing and maintaining SOPs for administrative processes.

Organising Digital Files and Folders:

- Ensuring systematic organisation of digital files and folders.

Template Creation:

- Designing custom templates in Word, Excel, and PowerPoint tailored to meet specific client requirements and enhance workflow efficiency.

Customer Relationship Management:

- Updating customer information.
- Sending out newsletters and communications.
- Handling customer inquiries and feedback.

Research and Analysis:

- Conducting market research.
- Performing competitive analysis.
- Gathering and analysing data for reports.

Scheduling and Calendar Management:

- Setting meetings and appointments.
- Sending reminders and managing follow-ups.
- Coordinating with team members and clients.

Communication:

- Managing email and filtering messages.
- Answering phone calls and taking messages.
- Providing virtual receptionist services.

Financial Tasks:

- Creating and tracking invoices.

Website Offering:

- Spearheading the creation and management of websites along with developing robust social media pages to maximise online presence and engagement.