

Mariel Lourdes R. Mateo | Operations & Executive VA

Administrative Support • Sales Operation • Insurance Verification • Customer Support

"Reliable back-office partner for patient care, intake, daily admin and operational efficiency."

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PROFESSIONAL SUMMARY

Results-driven and customer-focused administrative and operations professional with 5+ years of experience supporting healthcare, financial, and sales environments in fully remote, high-volume settings. Proven track record in delivering end-to-end support across customer service channels (phone, email, live chat, and SMS) while maintaining accuracy, compliance, and service excellence. Experienced in insurance verification, claims processing, and benefits validation, as well as billing, invoicing, and tax/SMSF administrative support. Adept at managing CRM systems, maintaining accurate records, tracking workflows, and ensuring compliance with regulatory standards. Strong background in lead generation, sales support, and pipeline coordination, consistently contributing to revenue growth and client engagement. Recognized for handling 30+ customer or patient interactions daily, achieving 90% CSAT and 90% FCR, generating 30 leads per day, and converting prospects into 10+ weekly appointments through targeted follow-ups and relationship management. Demonstrates strong capability in denial resolution, payment follow-ups, reporting, and process optimization to improve operational efficiency. Technically proficient in platforms such as Workday, Citrix VDI, NICE, Five9, Follow Up Boss, Sierra Website, XPM, Xero Blue, and Ignition, with a strong ability to quickly adapt to new systems. Known for delivering accurate, timely, and compliant administrative support, streamlining workflows, and enhancing both customer experience and internal operations.

KEY COMPETENCIES

- Virtual administrative support
- Customer service (email, phone, live chat)
- Healthcare customer service
- Medical administration and healthcare support
- Patient care coordination
- Referral coordination & Client on-boarding
- HIPAA compliance adherence
- Billing and invoicing support
- Clinical documentation
- Patient communication & follow-up
- Insurance verification
- Benefits eligibility validation
- Claims processing & Denial management
- Prior authorization processing
- Insurance & benefits education
- Case management coordination
- Patient records verification/correction
- EHR/EMR systems proficiency
- Customer relationship management (CRM)
- Cross-functional team collaboration
- Multi-stakeholder coordination (patients, providers, insurers, clinics)
- Patient record updating
- Healthcare documentation review
- Email and inbox management
- Lead generation & lead qualification
- Cold calling and appointment setting
- Lead nurturing & pipeline forecasting
- Sales target tracking & Revenue tracking
- Cold calling and appointment setting
- Follow-up sequencing
- Prospect list management
- Inbound/outbound call management
- Email outreach campaigns
- Sales conversion tracking & Sales reporting
- Service request handling
- Customer engagement tracking
- Customer support ticket handling
- Technical troubleshooting
- Account reconciliation support
- Client account management
- Accounts follow-up
- Customer account verification
- Customer issue resolution
- First call resolution handling
- Customer satisfaction monitoring
- Data entry and validation
- SMSF administration support
- Tax documentation processing
- Operations support coordination
- Report and presentation generation
- Process documentation and SOP creation

TOOLS/PROGRAMS

Project Management & CRM: Zendesk, HubSpot, Zoho
Lead Generation & Appointment Setting: Follow Up Boss, Pipedrive/Content Snare, LinkedIn Sales Navigator
Billing, Accounting & Finance: BGL, Ignition, Xero,
HRIS / Job Platforms: LinkedIn Sales Navigator
Content Creation & Social Media: Canva, CapCut, Adobe Photoshop, Meta Business Suite,
Communication & Collaboration: Slack, Microsoft Teams, Avaya, RingCentral, Citrix VDI, NICE, Five9
Admin Support & Productivity: Workday, Time Doctor, Docusign, Microsoft Office (Excel, Word, Outlook, OneDrive), Google Workspace (Sheets, Doc, Forms, Gmail, Forms)
Artificial Intelligence (AI): ChatGPT, Google Gemini, Open AI, Microsoft CoPilot

WORK EXPERIENCE

Admin Assistant – ES Company
Remote – Dee Why, Australia | May 2025 – August 2026

- Provided end-to-end administrative and operational support to a team of 4 accountants, improving workflow efficiency and task coordination
- Managed daily client communications, handling 10–20 emails and 15–20 calls per day, ensuring timely responses and high service standards
- Maintained CRM, records, and document management systems using XPM, Xero Blue, and Ignition, ensuring data accuracy and accessibility
- Prepared and issued monthly billing for accounting services and followed up on overdue annual fee instalments, supporting consistent cash flow
- Tracked workflows, deadlines, and compliance requirements to ensure timely completion of accounting and tax-related deliverables
- Assisted with SMSF and tax administration tasks for accurate documentation and regulatory compliance
- Coordinated calendars, meetings, and client correspondence to streamline scheduling and internal communication
- Generated reports and handled sensitive client data with strict confidentiality and adherence to data security standards

Inside Sales Representative – DM Real Estate
Remote – Las Vegas, USA | April 2024 – May 2025

- Generated an average of 30 qualified leads daily through strategic prospecting, including cold calling, email outreach, and online engagement
- Converted leads into 10 appointments per week by executing targeted follow-ups and personalized communication strategies
- Designed and implemented lead generation campaigns, leveraging cold outreach and nurturing techniques to attract and qualify prospects
- Managed and maintained accurate lead data using CRM platforms such as Follow Up Boss and Sierra Website, improving tracking and conversion visibility
- Built and strengthened client relationships through consistent engagement, increasing response rates and appointment conversions
- Coordinated with sales teams to ensure seamless lead handoff and alignment on client needs and expectations
- Consistently met performance targets by focusing on conversion-driven activities and optimizing outreach strategies

Insurance Verification Healthcare – Continuum Global
Remote – Mandaluyong City, Philippines | March 2023 – April 2024

- Managed insurance verification and benefits validation for an average of 30 patients daily, ensuring accurate and timely coverage confirmation
- Utilized tools such as Workday, Citrix VDI, NICE, Five9, and payer systems (including Aetna) to process claims, prior authorizations, and eligibility checks

- Coordinated with insurance representatives to confirm coverage, verify claim status, and resolve discrepancies efficiently
- Updated and maintained patient insurance records, ensuring data accuracy and strict adherence to HIPAA compliance standards Investigated and resolved denied or delayed claims, reducing processing delays and improving overall patient satisfaction
- Assisted patients with billing inquiries by providing clear explanations of coverage, benefits, and financial responsibilities
- Acted as a liaison between patients, providers, and insurance companies to streamline communication and support continuity of care
- Delivered high-quality patient support through strong communication and organizational skills, contributing to service excellence

Technical, Billing /Sales Representative – VXI Philippines
Remote – Muñoz Quezon City, Philippines | March 2021 – March 2023

- Delivered technical sales solutions through tailored product presentations, supporting an average of 30 customers daily via phone, email, and chat
- Built and maintained strong client relationships, achieving consistent 90% CSAT and 90% FCR through effective issue resolution and customer engagement
- Provided technical support, training, and troubleshooting, ensuring seamless product adoption and customer satisfaction
- Conducted personalized product demonstrations aligned with customer needs, contributing to increased conversion rates
- Consistently met or exceeded sales targets, including 2–3 Xfinity mobile upgrades or new device sales per month and driving 20% service sales growth
- Acted as a trusted advisor by recommending strategic, customer-focused product solutions
- Managed customer account creation, amendments, billing, invoicing, adjustments, and A/R activities, ensuring accurate and complete account records.
- Handled the end-to-end billing and invoicing process, including invoice validation, reconciliation, dispute investigation, and resolution of account discrepancies.
- Followed up on overdue accounts, negotiated payment arrangements, tracked collection activities, and maintained A/R records using Excel, CRM/ERP systems, and SAP.

EDUCATION

Bachelor of Arts (Political Science) – Dr. Yanga's Colleges Inc.