SHERYLYN CRUZ

CLIENT ENGAGEMENT COORDINATOR | CUSTOMER SERVICE & ADMINISTRATIVE SUPPORT

Bulacan, Philippines

PROFESSIONAL SUMMARY

Client-focused professional with 20+ years of experience across client engagement, customer service, administrative support, sales operations, and technical support. Skilled in client communication and follow-up, CRM updates, documentation, data accuracy, issue resolution, and handling confidential information. Known for clear communication, organized workflows, and reliable support across voice and non-voice channels.

CORE SKILLS

- Client engagement & follow-up
- CRM and lead management
- Mortgage file coordination
- Document collection & review
- Data entry and record accuracy
- Customer service & issue resolution
- Email and phone communication
- Process compliance
- Reporting and workflow coordination
- Time management & multitasking

PROFESSIONAL EXPERIENCE

Client Engagement Coordinator | Mortgage Services

Client engagement and mortgage operations support

- Coordinate client outreach, follow-ups, and appointment scheduling to keep mortgage conversations moving.
- Support loan file workflows by tracking documentation, requesting verification of employment (VOE), and following up on insurance and other required items.
- Maintain accurate client records and communication notes while coordinating with loan officers, clients, and third parties.
- Explain next steps clearly and provide timely, professional support throughout the client experience.

Financial Advisor | PruLife UK

Makati City | Mar 2017 – Apr 2019

- Guided clients through financial plan applications and reviewed income details and supporting documentation.
- Maintained compliant policy files, accurate records, and ongoing client support.

Export Sales Officer | Jeanology, Inc.

Manila | Mar 2015 – Apr 2016

- Processed export documentation accurately and coordinated with clients and operations to ensure complete paperwork before shipment.
- Introduced checklist-based review to help reduce errors and improve compliance.

Technical Support Specialist | Convergys Philippines

Manila | Oct 2014 – Mar 2015

- Resolved customer concerns through detailed questioning, clear explanations, and accurate case documentation.
- Handled sensitive client information in line with company procedures and service timelines.

Assistant Sales Manager | Kitchen Beauty Marketing Corp.

Manila | Mar 2009 – Mar 2012

- Maintained client records, reports, and operational data; supported customer issue resolution and trained staff on workflows.

Customer Care Agent (Equifax Account) | Site I Philippines Corporation

Pasig City | Apr 2008 – Apr 2009

- Responded to credit-related inquiries, recorded client interactions, and maintained accuracy, confidentiality, and policy compliance.

Executive Secretary & Marketing Assistant | Tyremart, Inc.

Mandaluyong City | 2000 – 2008

- Prepared confidential records and correspondence, coordinated interdepartmental documents, and supported executive administration.

CERTIFICATIONS & TRAINING

Virtual Assistant Apprenticeship Program – FHmoms, Inc. • TESDA NC II – Bread & Pastry Production • The 7 Habits of Highly Effective People