



# Lourens Kotze

Curriculum Vitae (CV)

**What job i'm looking for? My positive points**

Yours truly

Lourens Kotze  
0814469998

Sales and Service CV info

Objective

Desirous of challenging sales position as YOU! Sales and Client Care Advisor to apply creative solutions to understand clients needs and giving exceptional service as well as advising different solutions to their needs.

WA

Description :

I assisted with building the company from The Ground and the beginning. I was requested by founder on LinkedIn to help with business. My Duties was Sales and Operations. However as my experience are vast i assisted getting procedures in place, systems, processes also stepping in as Managing teams and assisting with Co ordination between hotels ect. Moving from manual to a more digital processing with regards to both Sales as well as the operational side. Wealth Alliance is partnered with Think and Grow Rich Foundation Educating on property investments.

Duties:

My Duties entailed the following :

Sales and Operations Coordinator (events)

- Sales and Percentages Ratio Averaged Sales per event
- Managing and Coordinating event. Flights speakers schedule ect
- Liaise with Speakers as well as attending to all needs of keynote Speakers.
- Introducing and Speaking at the events with average guest of 200 per event( events started at 3 events and were increase to over 18 events )
- Dealing with objection handling and allowing junior staff to just sell and myself dealing with the

hard sales and closing students.

Sales and Operations Coordinator (at office)

- Converting leads, Collections, and building rapport with clients to further up-sell other services and products
- Attending to clients queries and irate students
- Assisting Finance Managers with Recons
- Overseeing terms and conditions into accordance with CPA. Invoice books Salesforce and registered leads Sales per event both Free Seminars and Masterclass sales
- Ordering stock, printing as well as catering.

Second arrow

Decreased office expenditures 60% by implementing needed controls on stock/supplies and standardizing ordering procedures. Organizing rates and discount for hotel bookings venue. Working with suppliers to bring cost of production of all printouts, folders workbooks and cards down based on bulk ordering. Organized accounts with Caterors so the Business could pay 30-60 days arrears.

Third arrow

Created automated daily stats report that reduced inaccuracies and provided management with an important decision-making tool utilizing Google drive docs sheets. Also assisted them to switch over to Salesforce and having an system that pulls live data to measure sales accounted for as well as possible leads that could be converted into revenue as well as up-selling mentorships (of between 90k to 250k per student) as well as free seminar (14k) per student.

Sanlam

Description

Holding full responsibility for operational functioning, procedural enhancements, Financial planing coaching, quality management, team motivation, and administrative efficiency throughout my almost 2 year career as an Financial Advisor.

Duties :

My Duties entailed the following :

#### Financial Advisor

- Compiling ROA in accordance to faise and NCR, CPA regulations. Advising according to customer needs analysis. Financial planning and the four main quadrants.
- Getting prospects for potential policies
- Staff training and sharing best practices as being a Top Financial Advisor as a new comer.
- Focusing on key products as Retirement Annuity. (long Term Planning). Investment and Short, medium and long Term Investments. Wills , trust as a form of asset protection. Income protection to secure the clients greatest asset as well as should any unforeseen circumstances happen in regards to disability death or suicide.
- Track individual and group Sales Report Management.(SRM)
- Hosting updated trainings on competitors and products they provide (product comparison)
- Cold calling
- Schedule meetings with organizations for presentations
- Doing powerpoint presentations Face to Face and over Zoom.
- Get branding out to boost sales as well as client awareness of the brand.
- Booking and assisting teams to get potential prospects to see for possible sales as well as vetting prospect in to taking up products (high,medium or low)
- Customer service
- Yearly reviews
- Lead prospects for up-sales provided by Sanlam(Only after 1 year of service)
- Assisting Death claims, retirement payouts,product changes and any administrative changes.
- Hosting and inviting top clients to Migrate to wealth side that is Glacier another company of Sanlam

#### Absa Vermeulen

##### Description

While at Absa Vermeulen i was one of the best Hosting Customer Service Managers. I was requested by Zone 11 to educate and teach branches in close proximity. I manage to get all filing updates that was outdated 10 years at national treasury to be updated and send away to

headoffice for safekeeping. Reducing cost by 40% for overtime. Creating a family type environment where employees exceed in their personal capacities as well as inspiring new comers.

#### Duties

Assisting and managing staff and frontline as well as educating and assisting customers with queries and streamlining their service experience

- Increasing the SOS score and Net Promoter score by understanding the underlining needs and frustrations customers has and bringing solutions.
- Digital, Atms and Product training
- Sales oversight and managing SRMs
- Daily weekly and monthly reports, 2ic for management and authority to sign and do approvals for management while bot present
- Organizing CSI projects and raising necessary funding to bring change in community that business functioned in.
- Ensuring all policies and procedures are followed as well.
- Reconciliations
- Staff education and presentation for surrounding business.

#### Absa Quagga

##### Description

My Journey of employment started at Absa Group. I started my Journey with Agency Aptys at Absa Van der Hoff road. I always aspired to learn and grow from the get go. I received my permanent Position within 6 month of working with agency. I was appointed as head Teller at Quagga Centre Absa. I wanted to become multi skilled and within a few years i went from teller to Bulk- Teller, To Treasure Custodian to Teller SM(Teller Controller ) into branch Administration as well as Piloting ( sales drive within Absa Quagga Centre).

##### Duties

My Duties entailed the following :

##### Teller SM

- Daily Weekly and Monthly Balancing

- Draw all relevant Listings
- Managing and leading Teller sales/operations
- Courier and filing mounties, nampak ect
- Updating policies and Circulars

TREASURY

- Balancing
- Managing Cashflows Limits Reserve bank indications Atms CRMs
- SBV send and receive of all notes and coins
- ATM'S,Tube systems,TCR(Teller Cash Recycler machines)

Branch Administration

- Fica Requirements KYC CPA
- Daily weekly and Monthly Listings
- Maintenance and Occupation Health And Safety Co ordinator for the brach and completed Fire Marshal training
- Updating Asset Register
- Validating Sign on Registers
- Dealing with Irate Clients as well as managing all customer enquiries
- Order and Managing Stationery registers via SAP
- Overseeing BCM
- CCP

Reception and Switch Board Assistant

- Assisting Reception
- Have clear understanding about all Features and Benefits of products and services provided by Absa. Be able to cross sell. Know all the products
- Professional service and customer experience

Preferred occupation

**Administrators**  
Administrative jobs

**Team leader**  
Management, human resources jobs

**Operations controller**  
Other jobs

Preferred work location

**Pretoria / Tshwane**  
Gauteng

**Contacts and general information about me**

Day of birth	1987-06-29 (37 years old)
Gender	Male
Residential location	Pretoria / Tshwane Gauteng
Telephone number	<i>Information is available only for registered users.</i> <a href="#">Sign in</a>
Email address	<i>Information is available only for registered users.</i> <a href="#">Sign in</a>

**Additional information**

Salary you wish	11000 R per month
How much do you earn now	11000 R per month