



CARLO JAMES CUDIA

VIRTUAL ASSISTANT | OPERATIONS SUPPORT | DATA ANALYST

PROFESSIONAL SUMMARY

Finance graduate with 11+ years of experience in research, data analytics, and operations support at ISS, and performance management at Legal Soft. Skilled in executive reporting, incentive monitoring, and collaborating with global teams to drive efficiency and business growth.

CORE SKILLS AND COMPETENCIES

- Strong communication and admin support experience from working with US-based clients
- Operations and project management experience - led teams and ensured operational efficiency
- Delivered executive-level reporting for business reviews presented to top management
- Sales experience and collaborative work experience within a global team
- Advanced Excel knowledge for data monitoring and analysis
- Hubspot knowledge and ability to learn new CRM and Project management tools

WORK EXPERIENCE

Virtual Assistant - Performance and Compensation Manager | November 2023 - November 2024

Virtual Staff, Inc. (Virtual Assistant Agency), a business of Legal Soft

- Presented incentive plan proposals to the VP of operations and established key performance indicators (KPI)
- Collaborated with the Growth Director regarding sales targets and audited the performance of growth managers
- Maintained KPI data for over 140 virtual staff of the company, including 10 managers in the US main office, for performance monitoring and monthly incentive calculation
- Calculated monthly incentives for all eligible staff and partnered with the finance team to ensure timely payouts
- Conducted monthly performance reporting to the CEO and VP of operations
- Assisted in developing real-time dashboards for tracking sales, revenue, and other business metrics using Google Sheets

Data Analyst | January 2016 - June 2023

Institutional Shareholder Services Inc.

- Market Lead, Latin America Data Team: Managed a team of 10 analysts, streamlining operations to meet accuracy and turnaround time targets.
- Asia Data Team, Hong Kong & Singapore Operations Lead: Successfully managed operations, ensuring timely production of high-quality reports and exceeding service level agreements
- Ensured optimal staffing levels, adjusting to seasonal demands
- Conducted one-on-one sessions and designed performance development plans for low-performing analysts
- Developed and implemented effective training programs for new hires
- Acted as the primary point of contact and subject matter expert for all Latin America data-related issues, effectively resolving complex technical challenges and providing strategic guidance.
- Ensured client concerns were resolved and tracked for team performance assessment
- Collaborated with other managers for policy reviews, process improvement, and training to improve quality of reports

Financial Advisor and Assistant Unit Manager | April 2018 - December 2019

PRU Life UK

- Provided financial advisory services to clients, offering tailored solutions based on their needs
- Organized financial awareness seminars to promote the company's services
- Addressed and resolved concerns from existing clients to ensure continued satisfaction

Research Analyst | March 2011 - December 2015

Institutional Shareholder Services Inc.

- Analyzed shareholder meeting agenda to provide insightful reports and vote recommendations for the Asia market.
- Conducted peer reviews and provided feedback
- Prepared training materials and conducted training for new members of the team

ACADEMIC HISTORY

San Beda University | 2006 - 2010

Bachelor of Science in Financial Management and Systems Development