

Theo Mihell

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PROFESSIONAL SUMMARY

Client-facing finance professional with four years at Bloomberg LP, building and maintaining relationships with institutional investors through around 100 client queries a week, regular training sessions and tailored workflow support. Uses engagement and usage data to spot adoption gaps and intervene early, protecting retention and supporting renewals; led a client workflow redesign that cut a daily process from 3-4 hours to ~10 minutes (~95% efficiency gain) and supported 10+ revenue-generating RFPs valued up to £400k. Completing a BSc (Hons) Finance and Investment Management (2:1) at the London Institute of Banking and Finance alongside full-time work, with a strong grounding in macroeconomics. Seeking to move into client experience and account management within a subscription data business, where retention, adoption and growth sit at the centre of the role.

WORK EXPERIENCE

Equity Specialist, Analytics

2023-09 – present

Bloomberg LP, London, UK

- Resolved ~100 client queries per week for institutional investors, building trusted relationships and a deep understanding of how clients use financial data in their daily work
- Delivered regular in-person and virtual training sessions and client check-ins, keeping engagement high across Bloomberg Terminal workflows
- Tracked client usage and engagement across daily workflows, spotting adoption gaps and intervening early with tailored solutions
- Led a full client process revamp, reducing a daily equity analysis task from 3-4 hours to ~10 minutes (~95% efficiency gain)
- Maintained a Quality Control score above 96% and a resolve rate above 75% against a 70% department average
- Promoted and delivered webinars and training events, including an introduction to equities session for new apprentice hires
- Served on the Bloomberg Apprentice Committee (2024-2025), planning cross-department events including a winter social with a £10,000 budget

CAMS Specialist

2022-09 – 2023-09

Bloomberg LP, London, UK

- Supported 10+ revenue-generating RFPs, including projects valued up to £400k, as the key liaison between sales and internal product and engineering teams
- Presented and validated solutions aligned with client requirements, ensuring proposals and due diligence responses were accurate and on time
- Coordinated cross-functional project delivery to tight deadlines across multiple internal teams

EDUCATION

BSc (Hons) Finance and Investment Management

2023-01 – 2026-10

London Institute of Banking and Finance (LIBF), 2:1

Undergraduate degree in finance and investment management, completed alongside full-time employment at Bloomberg.

A-Levels (Sixth Form)

2020-09 – 2022-06

Kirkham Grammar School

Business Studies, Economics, Computer Science.

GCSEs

2015-09 – 2020-06

Kirkham Grammar School

10 GCSEs (grades 7–5) including Mathematics and English.

SKILLS

Customer Service	SOFT	Client Training & Delivery	SOFT
RFP & Sales Support	DOMAIN	Data Analysis	TECHNICAL
Stakeholder Collaboration	SOFT	Process Improvement	TECHNICAL
Quality Control	TECHNICAL	Public Speaking	SOFT
Bloomberg Terminal	PLATFORMS	Bloomberg API & BQL	TECHNICAL
Equity Workflow Consulting	DOMAIN	Project Coordination	SOFT
Financial Statements & Estimates	DOMAIN	Event Planning & Budgeting	SOFT
Multi-Asset Knowledge	DOMAIN	Mentoring & Coaching	SOFT

ACHIEVEMENTS

Duke of Edinburgh's Award, Gold

The Duke of Edinburgh's Award

Completed the full Gold award programme covering volunteering (50+ hours with Ronald McDonald House, Soup Kitchen London, Children In Need, London Food Bank), physical (football), skills (driving theory and lessons), expedition (Lake District environmental impact), and residential (Lake District hotel conservation and outdoor activities).

95% Client Process Efficiency Gain

Bloomberg LP · 2024

Led a client workflow redesign that reduced daily processing time from 3–4 hours to ~10 minutes.

28th at British National Biathlon Championships

British National Championships

Placed 28th in the country for biathlons at the British National Championships.

Club Cricket & County Cricket

Played cricket at club and county level.

Football Awards

Multiple club awards including Player of the Year, Players' Player of the Year, and Parents' Player of the Year. Played from age 4 and for Poulton Youth Football Club.