

MEREDITH B. GOLDSTEIN

Operations & Process Design Specialist

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PROCESS IMPROVEMENT | PROJECT ADMINISTRATION | OPERATIONS & OFFICE ADMINISTRATION | TECHNICAL EXPERTISE

Sharp, proactive operations professional focused on strategic priorities, company goals and improving the client experience. Intuitive critical thinker with wide-ranging business acumen and expertise implementing and fine-tuning systems, processes, and programs to improve efficiency and timeliness. Collaborative, productive working relationships with executives, staff, and stakeholders. Well-developed competency in serving as a liaison with all departments, outside partners, and clients.

Innate team leader, calm, and reliable in demanding situations. Expertise and strengths include:

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| ✓ Fast-Paced, Virtual Work Environments | ✓ Methodical, Results-Oriented Problem Solver |
| ✓ Well-Honed Organizational & Prioritization Skills | ✓ Intellectual Curiosity & Agility |
| ✓ Rigorous Attention-To-Detail & Quality | ✓ Integrity / Discretion / Confidentiality |
| ✓ Reliable Team Player | ✓ Exceptional Relationship Builder |
| ✓ Polished Verbal & Written Communication | ✓ Report Preparation & Analysis |

Process Improvement & Project Administration

Research and technical aptitudes employed when assessing current systems, evaluating new options, and implementing necessary changes to achieve process and project goals. Selected achievements include:

- Systematically reviewed processes and identified high priority workflows to be revised. Analyzed and improved the structure and each workflow step, increasing workload capacity by 10% and decreasing errors by 15% within one year.
- Improved vendor procurement and management, contracts management, and inventory management through research and solutions identification and implementation, resulting in decreased labor costs and a 20% increase in profitability.
- Created a professional interviewing process which improved candidate quality.

Operations & Office Administration

Dedicated operations manager, who creates a productive atmosphere, supporting managers and team members with clear, refined communication, dependable follow-through, and practical solutions to achieve goals. High level multi-tasker, demanding personal accuracy and quality. Successful record of identifying new opportunities, researching and determining best case technologies and solutions, and implementing changes to improve efficiencies, productivity, and profitability. Selected achievements include:

- Analyzed, tested, and improved Business Continuity Plan to account for remote office challenges.
- Established weekly meetings to elicit input from employees and owner, leading to improved communication strategies and a more positive company culture, resulting in a 50% increase in retention.
- Leveraged positive, productive relationships concurrently with staff and management knowledge to accomplish all goals.
- Operated an Excel financial system with reporting, contributing to a 400% increase in funding and company growth.
- Wrote company policy handbook and training procedures; implemented resulting workflow policies and trained employees, which decreased errors by 30%.

Technical Expertise

Innate technological aptitude with the ability to quickly learn new technologies. Current skills include:

- Financial: QuickBooks online and desktop
- Microsoft: Word, Excel, Outlook, PowerPoint, and SharePoint
- Google: Gmail, Docs, Sheets, Slides, Calendar, Drive, Forms, and Photos
- Backup Software: ShareFile, Carbonite, and Dropbox
- Remote Tools: Zoom, Ring Central, Teams, Slack, Team Viewer, Screen Connect, and Remote Desktop Connection
- Additional: MindManager, Junxure CRM, DocuSign, Intermedia Unite, Asana, and Hootsuite

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PROFESSIONAL EXPERIENCE

GOLDSTEIN MEDIA LLC, Doylestown, PA 2007 – Present
Business Operations

Researched, developed, structured, and built an interactive marketing agency. Achievements include:

- Evaluated and improved processes and procedures, which decreased project completion time by 30%
- Implemented reporting standards and analysis, which improved profitability by 20%.

JLFRANKLIN WEALTH PLANNING, San Rafael, CA (Remote) 2020 – 2022
Business Operations Manager

Managed process evaluation, development, and implementation. Responsible for prospect tracking, onboarding, and client service. Drafted client meeting agendas and lead staff and client meetings and followed up on action items. Supported Chief Compliance Officer with all SEC compliance responsibilities. Assisted with business development including executing social media and email marketing strategy, promoting the Startup Wealth podcast, and other special projects. Achievements include:

- Improved form completion process, decreasing processing times and errors by 20%.
- Eliminated CRM prospect backlog resulting in \$2 million increase in assets under management.
- Researched and implemented EOS Traction principles, increasing goal achievements by 25%.
- Streamlined remote client onboarding process, which increased client satisfaction.

BULLPEN BOYS, INC., Southampton, PA 2008 – 2020
Business Operations Manager (March 2009 – September 2020)
Inventory Manager (August 2008 – March 2009)

Oversaw process and procedures development, employee development, inventory management, vendor relations, and financial reporting. Arranged travel and managed related expense reporting. Achievements include:

- Increased sales volume 25% through successful staff development, implementation of proper business processes and systems, as well as improved vendor relations.
- Oversaw migration to new systems, which improved efficiencies and decreased labor costs.
- After quickly learning company complexities, promoted to Business Operations Manager within 7 months.

MORTGAGE INDUSTRY EXPERIENCE

Company	Title	Dates	Location
Acre Mortgage & Financial, Inc.	Loan Officer & Loan Processor	2005 – 2008	Bensalem, PA
Centex Home Equity	Loan Officer	2004 – 2005	Media, PA
Lincoln Mortgage Associates, LLC	Loan Officer & Loan Processor	2003 – 2004	Warminster, PA

- Built relationships with vendors and underwriters to quickly close loans and expand client base.
- Utilized high-level organizational skills to implement and manage all tasks from origination to closing.

EDUCATION

George Washington University, Washington, DC
Bachelor of Business Administration, concentration in Marketing, *Cum Laude*

Bond University, Gold Coast, Australia
Study Abroad Program