

MEREDITH B. GOLDSTEIN

Operations & Process Management

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

Sharp, proactive operations and process improvement 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 working cross-functionally with all departments, as well as outside partners and clients. Innate team leader, calm, and reliable in demanding situations. Expertise and strengths include:

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

Process Improvement & Project Management

Experience successfully managing multiple projects simultaneously. Research and technical aptitudes employed when assessing current systems, evaluating new options, and implementing necessary changes to achieve process and project goals. Currently pursuing Lean Six Sigma Green Belt with expected course completion in July 2022. 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, solutions identification and implementation. Result was decreased labor costs and a 20% increase in profitability.
- Created a professional interviewing process which improved candidate quality.

Operations & Office Management

Supportive, confident leader with uncompromising focus on both team and individual needs. Creates a productive atmosphere. Supports team members with clear, refined communication, dependable follow-through, and practical solutions to achieve goals. High-level multi-tasker. Demands personal accuracy and quality. Successful record of identifying new opportunities, researching and determining best case technologies and solutions – then implementing changes to improve efficiencies, productivity, and profitability. Selected achievements include:

- Created and implemented SOPs and training procedures, which decreased errors by 30%.
- Operated an Excel financial system with reporting, contributing to a 400% increase in funding and company growth.
- Analyzed, tested, and improved Business Continuity Plan to account for remote office challenges.
- Established regular touchpoints to elicit input from employees and owner, leading to improved communication strategies and a more positive company culture. Result was a 50% increase in retention.

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, WordPress, Asana, Hootsuite, and Intermedia Unite

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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. Worked in tandem with principal to develop functional business strategies. 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.

ACRE MORTGAGE & FINANCIAL, INC., BENSALEM, PA 2005 – 2008
Loan Officer & Loan Processor

- 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 & PROFESSIONAL DEVELOPMENT

Bucks County Community College, Newtown, PA
Lean Six Sigma Green Belt Course (Expected Completion July 2022)

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

Bond University, Gold Coast, Australia
Study Abroad Program