

MEREDITH GOLDSTEIN

Doylestown, PA • (267) 253-6769 • meredith.seidman@gmail.com • meredithgoldstein.info

Operations & Business Management | Process Improvement | Project Management

Driven operations and process improvement professional focused on strategic priorities, company goals and improving the client experience. ASQ Certified Six Sigma Green Belt, with wide-ranging business acumen and expertise implementing and fine-tuning systems, processes, and programs to improve efficiency and timeliness.

Analytical thinker with proven ability to establish 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.

Expertise and strengths include:

- Team Leadership
 - Rigorous Attention to Detail
 - Organizational & Prioritization Skills
 - Intellectual Curiosity & Agility
 - Problem Solving Complex Issues
 - Polished Verbal & Written Communication
 - Report Preparation & Analysis
 - Integrity / Discretion / Confidentiality
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PROFESSIONAL EXPERIENCE

Goldstein Media, LLC, Doylestown, PA

11/2007 – Present

Business Operations Manager (Contractor)

- Collaborate closely with the Creative Director on strategic planning, to build and grow this digital marketing agency offering web design, search engine optimization, and social media marketing.
- Increased revenue by 20% by implementing reporting & detailed analytics processes.
- Decreased project completion time by 30% through improving processes and procedures and rolling out the use of Basecamp project management software.

JLFranklin Wealth Planning, San Rafael, CA (Remote)

9/2020 – 2/2022

Business Operations Manager

Managed process evaluation, development, and implementation, as well as prospect tracking, client service, and onboarding. Supported Chief Compliance Officer with 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:

- Increased financial investment client base resulting in an additional \$2M in assets under management by prioritizing and reorganizing prospects within the Customer Relationship Management (CRM).
- Surpassed quarterly strategic goals (production, marketing, software implementation, client satisfaction, and process improvement) by 25% through researching and implementing Entrepreneurial Operating System (EOS) Traction best practices.
- Reduced financial services processing times and errors 20% by reassessing business strategy, creating roadmaps, and improving processes, which enhanced the client experience.
- Increased workload capacity 10% and decreased errors 15% by spearheading all aspects of process evaluation, development, and implementation and maintaining a continuous improvement mindset.
- Streamlined remote client onboarding process, improving client satisfaction by 25%.

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Bullpen Boys, Inc., Southampton, PA

8/2008 – 9/2020

Business Operations Manager (3/2009 – 9/2020)

Inventory Manager (8/2008 – 3/2009)

Oversaw process and procedures development, employee onboarding and development, inventory management, vendor relations, and financial reporting. Worked in tandem with principal to develop functional business strategies. Achievements include:

- Increased ecommerce sales 25% within first five years as Business Operations Manager, for this sports ticket broker on the resale ticket market, via development of pricing strategy and process improvement.
 - Decreased fulfillment operations errors 30% through gap identification, technology improvement, Standard Operating Procedure (SOP) creation, and workforce management.
 - Increased funding 400% by researching and valuing assets, tracking this data using Excel over the course of several years, to show the company's value.
 - Increased employee retention 50% by properly training, motivating, and encouraging staff.
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EDUCATION & CERTIFICATIONS

The George Washington University, Washington, DC

2003

Bachelor of Business Administration, cum laude

Bond University, Gold Coast, Australia

2001

Business Administration - Study Abroad Program

Lean Six Sigma Green Belt, Bucks County Community College

2022

ASQ Certified Six Sigma Green Belt, Certificate # 24157

Change Management Foundations, LinkedIn Learning

Salesforce Essential Training, LinkedIn Learning

TECHNOLOGIES

- Microsoft Suite (Excel, Word, PowerPoint, SharePoint, Outlook)
- Google Suite (Docs, Sheets, Slides, Calendar, Drive, Forms)
- Junxure CRM (Similar to Salesforce)
- Zoom
- Intermedia Unite
- QuickBooks
- MindManager
- Visio
- WordPress
- Microsoft Teams
- Slack
- Asana
- Basecamp
- LastPass
- DocuSign