

My mission is to help people work smarter, not harder! I'm the MacGyver of productivity and business process and am looking for a fast-paced, innovative, self-directed environment where I can help develop new, creative ways to solve complex problems and balance business strategies.

## SKILLS & COMPETENCIES

- ❖ operational & financial management
- ❖ data analyses & gap identification
- ❖ business/information system design & deployment
- ❖ project management (PM)
- ❖ technical writing & SOP development
- ❖ productivity coaching & training
- ❖ data architecture & information flow
- ❖ branding & marketing material design

QuickBooks (Pro & Online) [p], Microsoft Office [p], Outlook [p], Project [a], SQL [i], Visio [a], Visual Studio [i], VB.Net [i], Access [a], Small Business Server 2011 w/Exchange [i], Windows (incl. CMD) [a], InDesign [a], Illustrator [i], Acrobat Pro [p], OneNote [p], Zoho CRM/Project [p], Salesforce [p], Dropbox (Business & Basic) [p], GoToWebinar/Meeting [p], Zoom [p], G Suite [a], Wix [a], WordPress [i/a], Python [b], Tableau [b], Teradata [b]  
**[b] beginner [i] intermediate [a] advanced [p] power user**

## RELEVANT EXPERIENCE

Office Manager/Full-Charge Bookkeeper • TONKIN ARCHITECTURE • 2017 – Present  
(Acting Operations Manager/Controller/Director of Marketing & Branding)

- Instrumental in firm day-to-day operations and long-term viability
- Support executive leadership through operational insight and reporting, strategy development, project management, and conflict resolution
- Regulate all corporate finances (incl. credit & bank account monitoring, payroll processing, invoice preparation, A/P & A/R, state & local tax reporting, and input/manipulation/extraction of all data)
- Prepare all financial reports/projections, develop short- and long-term business strategies to ensure firm viability and compliance, and present issues and recommendations to executive team for implementation
- Liaison for annual Alliant R&D tax credit studies (incl. scheduling and data extraction/compilation/validation)
- Prepare, negotiate and support execution of vendor/client/subconsultant contracts (up to \$4M)
- Maintain corporate legal and administrative documentation (incl. licensure, insurance, and corp. ownership)
- Monitor sales pipeline and draft proposals in response to RFP/RFQs (gross revenues ranging from \$10k-400k)
- Complete all employee onboarding and separation, and develop HR procedures/checklists/forms/processes to prevent errors, create equitable policies, and ensure compliance
- Administer and benchmark benefit programs (incl. medical, dental, vision, long term disability, HSA, 401k) and aid executive team with performance reviews and employee raise/bonus decisions
- Analyze corporate processes and systems, identify gaps, and manage/configure/deploy/implement solutions to ensure efficiency, transparency, and functionality



206.890.1177



laurenwillar@gmail.com



laurenwillar.com

## RELEVANT EXPERIENCE CONT'D

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- Maintain all firm technology (hardware and software), troubleshoot issues and collaborate with outside IT consultant to resolve substantial problems, create user documentation, and train staff:
  - ❖ Setup/disable user, email, and VPN accounts
  - ❖ Manage/upgrade workstations and maintain FTP
  - ❖ Teach staff how to use systems, network devices, office equipment, and software
  - ❖ Was Project Manager of firm move/transitioned firm to unified VoIP communication platform
- Design marketing brochures, templates, and materials for use at events

### Productivity & Information Systems Consultant • PRODUCTIVUS • 2003 - Present (Currently, Short-Term Projects Only)

- Coach individuals and teams on business productivity and workflow concepts
- Organize records and maintain books for clients in legal and IT fields
- Develop custom IS solutions to improve information flow (incl. development of flow charts, infographics, SOP manuals, forms, checklists, and reporting tools)
- Design database, CRM and PM systems/structures/processes/conventions/standards to ensure consistency, accuracy and reduce inefficiencies
- Conduct studies and analyses of business processes/systems through observation and feedback sessions
- Prepare 'findings' reports, suggest improvements and make process/system recommendations

### Senior Customer Service Representative/ATM Custodian/Vault Manager • HOMESTREET BANK • 2013 - 2015

- Controlled branch ATM and Cash Vault including cash flow forecasting, compliance, recordkeeping, and Treasury shipment placement/consignment/reconciliation (\$200k+ volume)
- Coached/mentored branch employees through complex situations
- Established tailored banking solutions using relationship-based sales process
- Developed branch-level employee training program that was adopted into corporate training strategy
- Improved flow of information and efficiency of systems at branch level

## EDUCATION

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### Bachelor of Arts in Business Administration • WASHINGTON STATE UNIVERSITY • Magna Cum Laude

- ❖ Management Information Systems (MIS)

### Associate of Technical Arts • EDMONDS COMMUNITY COLLEGE

- ❖ Business Management
- ❖ Computer Information Systems (CIS)

## CERTIFICATIONS & MEMBERSHIPS

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### Mastering QuickBooks Self-Paced Online Training Courses • INTUIT/REAL WORLD TRAINING • In Progress

- ❖ Accounting Basics
- ❖ Payroll
- ❖ Level 1
- ❖ Level 2

### Notary Public • WASHINGTON STATE • Valid through 2022

### Nu Lambda Upsilon Chapter • ALPHA SIGMA LAMBDA • Member since 2016