

JEREMY FLANAGAN

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Professional Summary

Results-driven Director of Operations with 10+ years of experience optimizing business operations, leading cross-functional teams, and driving strategic growth. Adept at improving efficiency, streamlining workflows, and implementing systems that enhance productivity and profitability. Proven ability to scale operations, improve team collaboration, and execute high-impact initiatives that align with business goals. Skilled in workflow automation, revenue optimization, and strategic planning. Passionate about building operational excellence in fast-paced environments.

Core Competencies

- Operations & Process Optimization
- Strategic Planning & Business Growth
- Team Leadership & Cross-functional Collaboration
- Performance Tracking & KPI Management
- Workflow Automation & Efficiency Improvement
- Digital Tools & CRM Systems (Keap, Slack, Google Suite)
- Revenue & Profitability Optimization
- Membership & Customer Retention Programs
- Membership Program Management & Benefit Fulfillment
- Marketing Strategy Alignment with Operational Goals

Selected Accomplishments

- ✓ **Optimized Business Operations** – Led company-wide workflow improvements, reducing inefficiencies and increasing team productivity.
- ✓ **Implemented Process Automation** – Integrated CRM and project management tools, streamlining operations and cutting down manual work.
- ✓ **Led Cross-Functional Teams** – Successfully managed remote and in-house teams across marketing, customer service, and operations.
- ✓ **Improved Client Engagement & Retention** – Spearheaded improvements to membership program onboarding, boosting client satisfaction.
- ✓ **Drove cross-departmental alignment** by creating and maintaining detailed project documentation, ensuring sales, customer service, and event planning teams executed from the same playbook.
- ✓ **Pioneered use of AI tools** (ChatGPT) in marketing and operations workflows, accelerating content creation, campaign adjustments, and internal communications during high-pressure deadlines.
- ✓ **Expanded lead generation capacity** by leveraging joint venture partnerships and pre-event online summits, adding over 1,000 new contacts to the company database in a single campaign.
- ✓ **Executed direct mail marketing campaigns** (sales letters, postcards) integrated with digital promotions to maximize event registrations and brand reach.

Senior Project Leadership

Equity 2.0 Seminar — Perry S. Marshall & Associates

April 22-24, 2025

- Spearheaded the end-to-end planning, marketing, and operational execution of the company's flagship annual event, the Equity 2.0 Seminar, attended by over 80 in-person participants and 81 live stream registrants.
- Led cross-functional teams of 10+ staff, contractors, A/V vendors, and JV partners to deliver all event milestones on schedule, despite late-stage scope expansions and rapidly shifting market conditions.
- Facilitated strategic planning sessions that resulted in the development of the event theme, attendance and revenue goals, and promotional timeline.
- Directed promotional campaigns across email, webinars, direct mail (printed sales letters and postcards), and joint venture partnerships, generating 1,000+ new leads and maximizing brand reach.
- Implemented ChatGPT as an operational asset across copywriting, content generation, and marketing workflows, increasing speed and agility under tight deadlines.
- Oversaw live stream attendee engagement strategy, including live chat moderation and Q&A handoffs to speakers, enhancing participant experience and driving high post-event satisfaction scores.
- Managed full project documentation, ensuring customer service, sales, and event teams operated with aligned knowledge bases and updated protocols.
- Maintained fiscal responsibility without a set budget, ensuring all expenditures maximized ROI in a challenging political and economic environment.

Professional Experience

Director of Operations — Perry S. Marshall & Associates

10/2023 to Present

- Oversee all business operations, ensuring alignment with growth strategies and revenue goals.
- Optimize workflows, implement new processes, and improve team collaboration using automation tools.
- Lead performance tracking and KPI reporting, identifying areas for operational improvement.
- Direct membership program fulfillment, ensuring seamless service delivery and customer satisfaction.
- Manage compliance efforts, including website PCI certification and security best practices.

Marketing Manager — Perry S. Marshall & Associates

01/2016 to 10/2023

- Developed and executed marketing strategies that contributed to revenue growth and customer retention.
- Led a team of marketers, contractors, and JV partners to drive product launches and promotional campaigns.
- Oversaw webinar management, content creation, and PPC campaigns, aligning marketing with operational goals.
- Established performance tracking systems to measure marketing impact and refine strategies.

Project Manager — Perry S. Marshall & Associates

08/2009 to 01/2016

- Managed CRM systems, sales funnels, and automation projects, ensuring smooth business operations.
- Led cross-functional teams in building new products, developing sales pages, and streamlining service delivery.
- Standardized documentation and knowledge management to improve internal efficiency.

Technical Proficiencies

- **Operations & Productivity:** Google Suite, Slack, Microsoft Office, Wrike (Project Management)
- **CRM & Marketing Automation:** Keap (Infusionsoft), PPC Campaigns, Webinar Funnels
- **Process Optimization & Compliance:** Workflow Automation, PCI Compliance, Membership Fulfillment
- **E-commerce & Customer Retention:** Sales CRM Systems, Order Forms, Membership Management

Leadership Experience

- Volunteer Associate Pastor – Oasis of Light Church, San Antonio, TX – 2009 to 2018
- Apprenticeship Scholar – Charis Bible College, Chicago IL (1-year program)

Education & Certification

Bachelor of Science, Computer Information Systems – Dominican University, Cum Laude | River Forest, IL – 2004

2-Year Diploma & Minister's License – Charis Bible College | Chicago, IL – 2008