

KIM CONLEY, MBA

Dublin CA 94568 • Phone: (925) 577-5431 •

Email: kimberleysueconley@gmail.com • <https://www.linkedin.com/in/kimberleyconley>

* Legally authorized to work in the US*

QUALIFICATION SUMMARY

A Chief of Staff/COO/Practice Manager that can implement operational efficiencies, vendor selection, tech improvements, organizational structure, and communications. A passionate Operations Manager with 20 years professional experience in strategic finance, HR, operations, bookkeeping, employee experience, project management, executive assistance, and client services in both large companies and tech startups. Obtained MBA with top of class Honors.

PROFESSIONAL EXPERIENCE

Insight Wealth Strategies, LLC, San Ramon California *December 2017 - February 2024*
(6 years, 2 months)

Head of People, Finance, and Office Operations and Director of Client Services (Promotion)
Jan 2022 - Feb 2024

- In addition to previous responsibilities, I took over the management of the Client Services team to provide more structure and consistency across the team while reviewing processes to identify efficiency opportunities. Responsible for client administration, client onboarding and offboarding, quarterly billing, money movement, and client maintenance.
- Key Accomplishments:
 - Launched annual budget for firm for the first time, reporting forecasted vs actual expenditures and analyzing variances to better improve estimates
 - Improved reporting capabilities in technology to eliminate multiple manual spreadsheets across the Client Services team; dramatically improved communication across team members, providing consistent client service levels.
 - Revamped client onboarding process to eliminate manual data entry for new clients, providing a more enjoyable onboarding experience.
 - Worked with outside vendors to clean up integrity of data files in our billing reporting system to reduce manual tracking of some revenue streams.
 - Managed closure of one office and reduction in space of another office, including construction, lease negotiations, and vendor management.
 - Launched partnership with a new CPA firm and insurance firm.
 - Launched employee handbooks in 3 states, as well as Remote work agreements and remote employee reimbursements program

Head of People, Finance, and Office Operations (Promotion)

April 2018 - Jan 2022

- In addition to my HR and Office Operations roles, I was assigned the responsibilities of our Head of Finance. Responsible for bookkeeping, financial reporting, paying bills, ACH payments, client invoicing, performance reporting, receipt management, and data verification.
- Key Accomplishments:
 - Switched payroll providers to better align with business needs, introducing an applicant tracking system, onboarding portal, and eliminating manual paper time off requests.
 - Launched project to change 401K third party administrator to a more efficient and modern firm, including contract amendments, administration, and business needs assessments.
 - Switched to a paperless environment by scanning and filing all historical financial, HR, and operational records and maintain digital files moving forwards.
 - Worked closely with CEO and COO, in partnership with a consulting firm, to build a succession plan for the firm, which was a sole proprietorship at the time. Key contributor to the calculations and analysis needed to reregister as partnership.
 - Worked with COO to launch new technologies and work processes to increase our assets under management by 60% while reducing our headcount by 40%.
 - Moved Quickbooks Desktop to Quickbooks Online, increasing our reporting and access capabilities.
 - Interviewed, selected, and launched project to switch IT managed service provider to new vendor to help launch new technologies that resulted in massive business efficiencies.
 - Dramatically reduced business expenses through in-depth analysis, downgrading licenses/packages to align with business needs and reduce needless spending.
 - Managed project to relocate head office to new location, including construction, design, liquidation, timeline management, and vendor management.
 - Navigated staff through 15 months of remote work during COVID-19 pandemic, with a focus on mental health, employee engagement, and logistics.

Head of People and Office Operations

Dec 2017 - April 2018

- Responsible for all HR functions across two states, including recruiting, onboarding, payroll, 401K administration, health benefits, employee experience, career ladders, celebrations, team events, and training for 26 employees.
- Running four office locations, including vendor management, contract negotiations, supply management, technology needs, and infrastructure. Led two office relocations including architectural development, construction management, designs, purchasing, signage, and all vendor relations.

Dublin Elementary School PFC/PTA, Dublin California
Vice President

January 2015 - December 2017

- Volunteer full time for the PFC, raising funds and hosting events in an effort to provide financial support for enrichment programs, field trips and technology for the students.
- Digitized the PTA with online store, eliminating manual cash handling and tracking
- Worked with immigration lawyers to process green card, which was finalized Oct. 2017

DealDash, Helsinki Finland

February 2014 - December 2015

Head of People (Promotion)

- HR Department of One, responsible for pre-screening, interviews, logistics, onboarding, legal, visas, taxation, payroll, coaching/mentoring, and engagement of 48 employees
- Office management including office supplies, invoice approval, equipment, security, deliveries, travel arrangements and handling all visitors. Organized offsite event.

Major Achievements:

- Introduced applicant tracking software to recruitment process, scheduling software
- Hired, trained and integrated invaluable employees, bringing presence from 4 countries to 14 countries (including contracts, payroll, legal and logistics)
- Launching consolidated customer service program, eliminating manual data analytics
- Eliminated night shift by hiring customer service employees in a new continent

Head of CEO Office/ Executive Assistant to CEO

- Chief of Staff position, coordinated operational activities within the organization and acted as confidante and sounding board to the CEO
- Assisted in recruiting, scheduling interviews, and onboarding
- Coordinated large projects, working closely with many external parties
- Organized and prioritized CEO's calendar, reinvented the way the executive team manages their email

Aalto University Executive Education, Helsinki Finland

April 2010 - January 2014

MBA Student

- Graduated top of class with Honors Distinction in program evenings and weekends while on 3-year maternity leave in Finland. Specialization in Global Management.

Canada Life Assurance Company, London Canada

September 2003 - March 2010

Dealer Operations Specialist (Promotion)

- Informal leader of Electronic Processing team of 8, responsible for developing and maintaining relationships with partner offices
- Subject matter expert for administrative projects, including IT upgrades and launches

Client Service Specialist (Promotion)

- Senior administrative processor of applications, deposits, redemptions and client inquiries regarding their retirement products; complex processing and complaints

New Business Coordinator

- Calculated group annuity quotations for large employer pension plans

EDUCATION

Aalto University Executive Education, Helsinki Finland *2012-2014*

Masters in Business Administration (MBA), Global Management

- Graduated top of class with Honors Distinction, Grade A

Western University, London Canada *1999-2003*

Bachelor of Administrative and Commercial Studies, Finance

COMPUTER SKILLS

Google Programs: Gmail, Admin, Calendar, Docs, Sheets, Slides, Forms and Chrome.

Operational Programs: Applicant Tracking Software (Lever, Workable, Paylocity), LinkedIn Recruiter, DropBox for Business, NimbleSchedule, Primalogik 360, Intuit Payroll, Quickbooks Desktop, Quickbooks Online, Salesforce, RedTail, Wealthscape, Orion

Communication Tools: Keynote, Office, ZenDesk, Blogger, Hipchat, Slack, Facebook, Trello, GitHub, Yammer, Skype, Desk, LiveAdmin, GoToMeeting, RightSignature, DocuSign, Microsoft Teams, Zoom, ZoomPhone

Financial Programs: WealthScape, Schwab Advisor Portal

VOLUNTEER EXPERIENCE

Wells Middle School Parent Faculty Club, Dublin CA *07/2022-Present*
Treasurer

Dublin Elementary School, Dublin CA *2015-2021*
Vice President, Parent Faculty Club
Director of Operations, Parent Faculty Club
Talent Show Coordinator, Parent Faculty Club
Room Parent, multiple years

Personal interests: reading, baking, rowing, walking my dog, getting takeout and watching movies