

## **Serene Solutions, Select Client Engagements**

### **Global Giant**

#### 2015: Portland, Nike, Advanced Innovation

Upon completing my full-time role at Nike, I transitioned to a 2 month consulting role to facilitate integration and success of the knowledge management systems and processes into the AI structure.

Additionally, I created a relationship with the academic director of the Columbia University's Master of Science in Information and Knowledge Strategy (IKNS), which led to a graduate of the program being hired by Nike to continue and expand the work I began.

### **Sampling of Small Business Engagements**

#### 2016: Portland, Chiropractic Practice

This busy practice was in need of evaluation and organization in preparation for sale. A major piece of the puzzle was trapped in the Practice Management software. The specific PM software was new to me; I was up to speed in a few days.

Primary activities:

- Discovered over \$200K of lost revenue via data mining. There was little reporting available to the end users; worked with a representative of the software company to extract the data, then evaluated and created reports.
- Facilitated expansion of billing codes and inventory codes for accurate billing
- Created best practices and trained the doctor and employees in use to avoid lost revenue
- Created custom training manual and operating procedures
- Worked with medical biller to fix mistakes and resubmit claims
- Prepared a letter of evaluation and my professional opinion that the records in the PM system were accurate and up-to-date.

#### 2019: Portland, Upscale Boutique with New Business Owners

Client (married couple) purchased an existing, very successful Portland boutique and was struggling with being accepted and respected by longtime clientele, as well as conducting all business on paper. There was no automation, whatsoever.

They wanted to lead with technology. I advised them that without established practices and procedures, there would be much time wasted, and likely not the best tool selected for the job. Additionally, if there was no clientele, it would be pointless, so to first focus on relationship building. I helped them plan a series of events and promotions to foster these relationships, and created an evaluation staged checklist for introducing automation.

#### 2011: Mexico, Boutique Hotel

While providing healing arts at a retreat center, I discovered a nearby boutique hotel that was looking to grow and had only a very basic one page website. Utilizing Wix, I created a website with a calendar, booking engine, customer engagement, and beautiful gallery to showcase the property. I worked with the client every step of the way, to ensure she would be able to manage and update the website into the future.

## **Serene Solutions, Select Client Engagements continued**

### 2006: Atlanta, Chiropractic Practice

Client needed a website, to engage patients via newsletter and direct email, and to more effectively manage billing and accounting. Utilized MS Frontpage, Constant Contact, and Excel, and documented daily, weekly, and monthly procedures for use and maintenance.

### 2006: Atlanta, Custom Printer

Client had an avalanche of holiday orders with no system for managing, and needed help with increased administrative tasks. Stepped in to do whatever was needed, which included creating a fancy management spreadsheet and a simple website, using MS Frontpage, for customer communication, order requests, and marketing.

### 2006: Atlanta, Interior Designer

Client had successful business for decades, but was unorganized and wanted to change that. Helped her setup office, computer, spreadsheets, and inventory and relationship management systems.

### 2006: Atlanta, Jewelry Artist

Client had several hundred professional photos taken of all her work, and needed to showcase on an existing web platform. Uploaded, categorized and arranged all photos, added descriptions, and included artist bio. Documented process and trained client to manage going forward.

### 2004: Atlanta, Living Foods Institute

Supported founder and institute growth at a pivotal time, using technology and process improvement to streamline operations and refine educational materials.

- Installed, configured and created business processes for Quickbooks POS. Trained all users.
- Created inventory management process
- Edited and updated course manual and handouts
- Updated and maintained website using MS Frontpage
- Created volunteer coordination process and shared calendar

Facilitated student education and provided emotional support during courses.