

LOURDES MARTINEZ

Silver Spring, MD

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Dynamic Client Relations & Office Administration Professional with 15+ years experience

PROFESSIONAL PROFILE

Client Relations and Office Administration Professional with 15+ years of experience successfully building client relationships with top Fortune 100 financial institutions and non-profits. Managed client relations function for diverse organizations resulting in increased client retention rates and organizational performance. Skilled at developing and maintaining administrative processes that increase efficiency and meet organizational objectives. Detail-oriented with strong work ethic and accountability.

SKILLS

Language: Native verbal and written fluency in English and Spanish.

Software: Operating systems (Mac Sierra, MS Windows 10), MS office suite (Word, Excel, PowerPoint, Outlook), QuickBooks, Salesforce, GoldMine, GoToMeeting, Live Meeting, WebEx, Concur, Stratustime.

PROFESSIONAL EXPERIENCE

Office Manager, GMED, North America (Bethesda, MD) 2018-Present

- Manage office services by organizing office procedures for international medical device certification firm.
- Approve supplies and IT equipment requests, manage procurement and maintain asset management.
- Review electronic timesheets for all employees ensuring completeness (Stratustime software).
- Process employees and contractors expense reports electronically (Concur software).
- Coordinate logistics for client meetings and corporate events.
- Provide customer service to internal and external clients.

Founder/Director, OLNEY ACUPUNCTURE (Olney, MD) 2011-Present

- Planned, coordinated and implemented set up of a new private practice and professional office in 90 days.
- Interviewed and hired vendors, led website designer, created and manage wireless office automation/workflow and administrative procedures ensuring efficiency.
- Promote business in external professional events using PowerPoint presentations and interactive demonstrations. Engage new contacts/prospects with timely follow-up.
- Maintain established customer relationships increasing retention rates by 65%.
- Develop and maintain financials through metrics to evaluate business performance, trending and effective targeted outreach using *Excel* and *QuickBooks*. Manage accounting function, customer and vendor payments, purchase and inventory of supplies, resulting in just-in-time delivery and cost control.
- Perform technology tasks using latest software (*Windows 10; Mac Catalina* operating systems), data migration and sharing via secure cloud storage adhering to federal data security regulations (HIPPA) to ensure client confidentiality.

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- Manager of Client Relations, WEALTHENGINE (Bethesda, MD)** 2005-2008
- Assisted with merger of *WealthID* and *WealthEngine*, successfully migrating 150 *WealthID* clients (with 500+ users) seamlessly to *WealthEngine's* accounts.
 - Developed, implemented and delivered on-site and virtual product training sessions via *GoToMeeting* that facilitated training clients in large groups; taught clients how to run queries and evaluate data; reduced travel expenses by approximately 48%.
 - Managed web-based subscriber accounts that resulted in annual recurring revenues of \$700,000 and 80% client retention rates.
 - Created and finalized user guide for web-based product.

- Manager of Client Relations, WEALTHID, INC. (Burtonsville, MD)** 2001-2005
- Established new corporate office for business after separation from its parent company, Thomson Financial, (leasing office space, procurement, staffing, office procedures and accounting).
 - Migrated parent company's clients (financial services and non-profits) seamlessly to new business accounts.
 - Managed client relationships with 85% client retention rate and annual recurring revenue of \$500,000.
 - Developed, implemented and delivered on-site and virtual product training sessions via *Live Meeting* that facilitated training clients in large groups; taught clients how to run queries and evaluate data; reduced travel expenses by approximately 50%.

- Client Care Manager, THOMSON FINANCIAL (Rockville, MD)** 1998-2001
- Created and implemented Complete Client Care Program, establishing relationships with clients when contracts received; ensured proper follow up with clients after products delivered.
 - Designed, implemented and delivered virtual software product training for web-based products clients. Taught clients how to run queries and evaluate data.
 - Managed design and implementation of customer relations database (Goldmine software) that effectively tracked client inquiries, response rates and product deliveries.
 - Supervised two product support analysts conducting quality analysis and technical troubleshooting.
 - Managed client contracts and billing for clients and vendors; executed commissions for sales consultants.
 - Coordinated client meetings, conferences and calendar of events.
 - Hired and trained staff. Conducted performance appraisal reviews.

PREVIOUS POSITIONS: Project Manager, Human Resources Manager

EDUCATION & TRAINING

Maryland University of Integrative Health, MA, Acupuncture 2008-2011
National Board Certification, Acupuncture 2012
New York University, BA, Biology