

## **KM Jones | Projects in Executive Administration**

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Executive Support | Ops Leadership | Salesforce & Event Systems

Strategic and highly organized Executive Assistant & Project Coordinator with extensive experience supporting C-suite executives. Skilled in global scheduling, CRM systems, business intelligence, and cross-functional coordination. Proven ability to streamline workflows, manage confidential projects, and implement scalable solutions for high-growth organizations. Adept at working across multiple time zones, managing high-profile clients, and ensuring operational efficiency.

### **Administrative Excellence & Event Coordination**

- Organized high-level client events, including recurring investment club dinners for 25+ attendees.
- Oversaw design and delivery of a custom 3D-printed board member gift.
- Transcribed and edited quarterly investment newsletters, created visual aids, and managed client distribution.

### **Operational Efficiency & Digital Enablement**

- Digitized and structured a founder's handwritten notes into a searchable digital system.
- Contributed to firm's Culture Committee, organizing donation drives and internal engagement.

### **Executive Project Support & Organizational Alignment**

- Chaired the Executive Assistant Council, coordinated EA meetings, and tracked action items.
- Supported CAO in hiring efforts, liaised with recruiters, conducted interviews, and aggregated feedback.
- Acted as liaison to nonprofit partners, reviewed funding submissions, and voted on grantee selection.

### **Systems Innovation & Inclusion Strategy**

- Led migration from Excel to Salesforce, built interfaces, and managed cross-functional collaboration.
- Chaired recruiting and inclusion committee; tracked KPIs and presented updates.
- Headed nonprofit recruiting, set budgets, attended conferences, and created presentations.
- Designed inclusive holiday calendar for employee resource group celebrations.

### **Global Executive Operations & Strategic Initiatives**

- Coordinated CEO logistics for executive meetings and engagements.
- Led international conference scheduling; created bio books, managed logistics in Excel and Salesforce.
- Built Salesforce dashboards to track prospective clients and outreach.
- Onboarded Asset-Backed Finance team; migrated Outlook data to Salesforce.