

CAROL LEE

Contact

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carol-lee-4202063/](https://www.linkedin.com/in/carol-lee-4202063/)

Skills

- Microsoft 365
- Sharepoint
- Articulate 360
- Visio
- Strong Excel/Power Point
- Tableau, SAP, Concur

Education

Master's Degree
Experimental Psychology
Texas Tech University

Bachelor's Degree
Liberal Arts
Major in Psychology
Minor in Social Work
University of Texas - Austin

Volunteer

Business Process Analyst
(PMI - OC)

VP of Finance
(Oxford Prep Academy)

Girl Scout Troop Leader
(Lake Forest Service Unit)

PROFESSIONAL PROFILE

Process-oriented, focused and results-driven professional with exceptional organizational skills. Highly proven in problem-solving, multi-tasking, scheduling and allocation of responsibility. Adept at working both independently and cooperatively with a team of diverse personalities and skill sets. Demonstrated abilities in mentoring, mediating between employees and leading team projects. Known for getting up to speed quickly on new technologies.

RELEVANT EXPERIENCE

AERIE PHARMACEUTICALS - 2017 - 2019

Associate Sales Operations Analyst

- Launched and maintained custom reports and dashboards for identifying product growth, rank and potential opportunities for sales force.
- Ensured all reports assigned were built, validated and distributed on a timely basis to superiors and sales operations team.
- Created reports using Tableau to analyze and forecast prescription prescriber trends. Prepared and interpreted subsets of prescriber data based on weekly prescription habits to help trouble-shoot potential problems and enable better informed decision making for business and sales areas.
- Spearheaded special projects, such as year-end growth reports, for sales team by territory, district and region.
- Created and maintained prescriber and prescription growth charts and Venn Diagrams displaying weekly trends in sales between our two glaucoma products to uncover broader trends and identify ways to reach target goals and predict outcomes.
- Seamlessly took over Executive Assistant duties while she was out on maternity leave. Duties included planning and execution of a national sales conference. Managed hotel and air travel for over 50 nation-wide Sales Reps. Orchestrated catering, conference rooms, and team building dinners which resulted in a successful conference.
- Also maintained two VP's calendar, expense reports and helped process purchase orders. Coordinated off-site Marketing team outings, secured vendor locations and logistics for Marketing conferencing events.
- Helped integrate an entirely new Learning Management System that was rolled out company-wide. Uploaded and tested new training modules for Sales team. Maintained and troubleshooted compliance modules for a group of 100 territory managers, helping them complete their training curriculum within their deadline.
- Created product training modules using Articulate E-learning software thus saving the company \$220K. Worked with regulatory team to help ensure training materials are in compliance.

GOIN NATIVE THERAPEUTIC GARDENS - 2017

Project Manager

- Project manager of citywide Fall fundraising festival, in which I secured cost-effective vendor support, entertainment, educational and hospitality services. Responsibilities included schedule and coordination, vendor selection, contract negotiations and organizational on-site mapping of over 50 booths.
- Administered contracts to deliver outstanding vendor coordination, timeline development, budgeting and day-of coordination services. As a result, all vendor, speaker, band, and food truck spots that were available were filled.
- Followed up with festival participants to make sure all documents were sent in and payments made. Maintained project planning timeline. Festival day duties included festival set up, checking in vendors, speakers, bands, food trucks, VIPs, and volunteer staff. Ensured all participant needs were met and money was turned in. The festival made front page news as a huge success in our local, Southern California newspaper.

NFP SECURITIES, LLC- 2007- 2011

Rep Support Specialist/Licensing & Administration Coordinator

- Promoted to Licensing and Administration Coordinator and became first point of contact for new Reps joining our firm. Evaluated all compliance issues to ensure a seamless transition within our firm. Handled Sales Agents from throughout the country.
- Handled all issues dealing with their nation-wide Sales Agents joining our firm, therefore had to have extensive knowledge of entire Broker/Dealer firm.
- Entered complex trades for their Sales Agents over the phone, therefore had to be timely and precise. As a result, all trades went through without problems. Passed Series 7 licensure exam the first time I attempted it.

TEXAS COUNTY & DISTRICT RETIREMENT SYSTEM - 1998 - 2003

Senior Benefits Analyst

- Promoted several times from Benefits Analyst to Trainer and Project Manager.
- Responsible for development, delivery, maintenance and coordination of all soft skills and light technical training modules for new and current employees in Benefits Department.
- One of few analysts capable of handling any type of benefit situation including qualified domestic relations orders, bankruptcies, forgeries, estates, trusts, IRS levies, and minor beneficiaries.
- Managed many special project teams including; legal process updating, improving communication between teams, and a cost/benefit analysis for updating specific data in our Pension Plus software.

ESPERANZA RESIDENTIAL TREATMENT CENTER - 1996 - 1998

Treatment Coordinator/Therapist

- Managed a small team of counselors responsible for a group of teenage boys in the custody of Child Protective Services or the Texas Youth Commission.
- Led counseling groups for treatment of substance abuse, anger management and sex-offenses.
- Met with treatment Psychiatrist, Clinical Psychiatrist, and CPS and TYC managers to coordinate and oversee treatment.
- Kept parents apprised of child's progress and advised parents on a healthy transition back into the household, mainstream school system.

