

# JULIA R. FELTS

Business Operations Leader

## ABOUT

Highly-motivated, strategic leader known for driving growth of early-stage companies by aligning vision, people and process. Trusted mentor with deep understanding of business and operational processes. Self-starter, metrics-driven with an entrepreneurial mindset and exceptional analytical, people management and change management skills. Passionate about creating scalable systems, driving reputable company culture and aligning departments for long-term success.

## EDUCATION & ACHIEVEMENTS

**University of California, Berkeley Haas School of Business**  
MBA, Entrepreneurship & Executive Leadership

**California State University, Sacramento**  
BS, Molecular Biology

**2012 Leadership San Francisco Program**

**2008 Leadership Sacramento Program**

**Certified Scrum Master**

## EXPERIENCE

### Operational Consultant

San Francisco & Los Angeles  
Jan 2013 - Mar 2014  
Sept 2016 - Present

Part-time / interim operational leadership for emerging companies, providing strategic and tactical guidance for scalable business operations.

#### **Industries**

*SaaS, Professional Services, Apparel Manufacturing & Retail*

### VP Operations

San Francisco  
Nov 2015 - Sept 2016

Venture-backed SaaS startup providing grant management platforms to philanthropic foundations.

*I worked directly with the CEO, COO, CFO and Board of Directors as a member of the Senior Leadership Team.*

### Julia Felts Consulting

I work directly with founders and senior leaders to identify and solve organizational and operational pain points. The scope of projects reflect the specific needs of each client and typically include financial & strategic planning, systems & process design, people operations and executive coaching.

- Clarify vision, business model and strategy; align goals with people and systems
- Build financial model, assess and improve finance & accounting systems
- Define KPIs; create dashboards, scorecards, and reporting processes
- Implement tools to streamline operations and enable metrics-based reporting
- Connect systems to enable working financial models and accurate forecasting
- Change management, coaching and support for new and growing leadership teams
- People operations leadership; optimize team structure, create growth plans; identify, source & place key hires
- Provide guidance for capital fundraising, including preparation and investor outreach


### Fluxx Labs

**Strategy / Finance / Business Operations / Communications / HR & People Ops**

- Engaged and collaborated with multiple stakeholders to drive large-scale business transformation, including developing business models, best practices, organizational design and cross-functional initiatives
- Led change management initiatives; defined KPIs; implemented reporting processes and Quarterly Business Reviews
- Prepared slide decks, performance reports and business models for Series B raise
- Led the selection and implementation of ten operational systems within nine months to improve process, transparency and reporting capabilities
- Facilitated Senior Leadership Team meetings and quarterly retreats; implemented first ever company-wide goals / OKRs

## CONTACT

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## COMMUNITY & INTERESTS

### Founder, Brilliance

A community that facilitates friendship, support and empowerment among women. Based in San Francisco & recently expanded to Los Angeles. [www.brilliancegroups.com](http://www.brilliancegroups.com)

Sailing (certified), trail running, half-marathons, golf, yoga, snowboarding, traveling, photography, writing and connecting people

## EXPERIENCE (continued)

### VP Operations

San Francisco  
Nov 2015 - Sept 2016

### Managing Director

San Francisco  
Mar 2013 - Nov 2015

Bootstrapped, boutique technical recruiting firm catering to high-growth tech startups in the Bay Area.

*Working directly with the Founder/CEO, I was responsible for human resources, finance legal, and general business operations.*

### National Director of Resident Services & West Coast Ops.

San Francisco  
Oct 2008 - Aug 2012

Multi-family real estate and property management firm based in NYC.

*I worked directly with the CEO and COO as a member of the Senior Leadership Team.*

### Director of Operations

Sacramento & San Francisco  
Mar 2004 - Oct 2008

Bootstrapped event planning & corporate concierge company.

*I worked directly with the Founder/CEO and managed the entire concierge business.*

### Fluxx Labs (continued)

- Led the company through a sensitive market adjustment of compensation and equity for 60+ employees following Series A raise
- Implemented employee engagement surveys; implemented performance reviews
- Provided coaching, mentorship and HR guidance to staff and senior leadership
- Managed outsourced recruiting team and entire hiring process; implemented Greenhouse ATS; created organizational strategy, identified key hires
- Served as primary contact for interim CFO and outsourced accounting team

### The Sourcery

#### Strategy / Finance / Business Operations / Communications / HR & People Ops

- Increased annual revenue by 77% and profit by 55% in one year by defining performance metrics and improving operational processes
- Managed \$4.5M P&L; prepared monthly, quarterly and annual financial reporting; created and managed departmental budgets
- Facilitated definition of company mission, vision, values and goals; implemented company-wide OKRs
- Managed internal communications and led roll-outs of major initiatives
- Built a People Operations department; defined our employer brand and internal recruiting strategy
- Led the research, selection and implementation of a CRM to improve sales process, internal communication and customer experience
- Implemented company's first performance management and career advancement program; managed workforce planning, hiring and talent management

### Stellar Management

#### Strategy / Business Operations / Corporate Communications / Customer Service

- Helped design business operations for a new property management division within 5 months, subsequently assuming management of an 11,000+ unit, nationwide portfolio valued at over \$2.25B
- Built and managed the Resident Services unit; ensured consistent service across a distributed team of 75 employees in 13 locations, serving 15,000+ residents.
- Led the design of an in-house software to manage customer services requests and enable online resident access, resulting in 30% more on-time rent payments; developed weekly dashboard reporting features within our CRM
- Led a portfolio-wide collections program, reducing A/R by over 53% in 18 months
- Managed communications with stakeholders, employees and residents

### City Concierge

#### Strategy / Business Operations / Corporate Communications / Customer Service

- Built and managed a corporate concierge business for Class A commercial and multifamily properties; defined services, identified targets, sold and managed contracts; managed employees, budgets and business operations
- Increased our client base by 400% in three years with expansion to San Francisco
- Designed and launched a Virtual Concierge product, the first in the industry
- Designed proprietary CRM & Project Management tool to track metrics and drive consistency of service