Nicole J. Graven

• 1223 Bulgarmarsh Road, Tiverton, RI 02878 •

Experience

Tilman Dental Group | Newport

Chief Operations Officer   February 2020- January 2023

Integrator for a dual-office dental practice. Responsibilities include operations and strategic planning. All personnel (25+ team members) and HR matters including coaching, hiring and onboarding, termination, and payroll and benefits. Internal and external conflict resolution. KPI tracking and reporting. Creating, implementing, tracking, and accountability for procedures and protocols. Planning and facilitating weekly and quarterly team, departmental, leadership, and company-wide meetings and outings. Provider credentialing. Marketing and branding. Ensuring that our patient and employee experiences are aligned with our core values and mission. IT troubleshooting. Eaglesoft, CEDR, Dental Intel, Modento, Mango, Revenue Well, Weave, Slack, Asana.

Kahn, Litwin, Renza & Co., Ltd. | Newport/ Providence, RI

Wealth Management Client Services Associate   July 2019 – December 2019

Process client paperwork. Draft client correspondence. Facilitate staff and client meetings. Prepare presentations. Create spreadsheets. Maintain e-filing system. Software- Morningstar, NetX360, Salesforce, Envestnet, CNG Safe, STAR.

Office Supervisor   January 2019- September 2019

Process tax returns, extensions, and financial statements. Prepare tax engagement letters and other correspondence. Provide support to CPA staff. Coordinate vendor scheduling. Purchase supplies for office. Supervise administrative staff. Provide RI Notary Public services. Software- ProsystemFX, Axcess, Safesend Returns, XCM, Advanced Adobe Suite, Microsoft Word, Excel, PowerPoint.

Family Office, Private Estate, Little Compton, RI

Administrative Manager   2015- September 2019

Maintain 24/7/365 availability in operating large estate based in Little Compton, Naples, FL and New York which consists of quarterly financial statements, accounts receivable, payables, account reconciliations and operations reports via QuickBooks and Google Suite. Develop a written cloud-based policies and procedures notebook for all estate activities. Act as communications liaison with business and family associates, including attorneys, investors, brokerage firm, and bankers, and administer family calendar. Manage all vendor relationships and supervise estate staff including payroll. Control central calendar for multi-generational family, staff, and vendors. Event and meeting planning and hosting for business, personal, political, and charitable functions. Support CEO of Wealth Management Firm with operations, correspondence, shareholder calculations and distributions, corporate dissolution. Major projects as assigned.

NJDespres Enterprises | Little Compton, RI

Business Owner   2005 – 2015

Provide CBT-based coaching, organizing, and property clean-out services to clients suffering from Compulsive Hoarding and Acquiring disorders and/or affected stakeholders. Coordinate property improvements, repairs, and cleaning for clients after clutter clean-outs, pre- or post-sale. Manage a team of 13 professionals through diverse projects for clients in the areas of planning, organizing, household management, and concierge. Handle all e-commerce, marketing, and administrative aspects of business, including blog, website, social media, QuickBooks payroll and accounting. Appear at housing, municipal, DCYF custody, and guardianship hearings as expert witness.

Geerlings & Wade, Inc. | Canton, MA

Director of Sales and Customer Service 2004-2008

Managed team of 45 in a call center environment. Participate in and compile KOI reports, business strategies, profitability, and productivity measures for Weekly Executive Management meeting. Completed intranet-based process and procedures manual. Define, implement, measure, and improve processes and procedures for the consumer division as pertains to Personnel issues, Customer Service, Product Knowledge, Supply and Demand, and Interdepartmental processes and communications. Develop strategy to exceed goals company increasing overall profitability. Redefine the structure of the department including creating job descriptions, career pathing model, and structured a compensation plan to reflect individual competencies of each staff member within their department role, by using a pay-for-performance system based on SMART goals within budget. Develop, implement, and monitor continuous value-added-based sales training and incentive programs focused on the "Perfect Proactive Call" to capture optimum cross-sell and upsell opportunities. Act as the Public Relations Specialist for the consumer department with BBB, Attorneys General of thirty-six states, and 1,800 independent wine consultants.

Mastors & Servant, LLC. | East Greenwich, RI

Personal Lines Unit Leader 2001-2004

Supervise a team of seven Personal Account Managers, two Administrative Assistants, and six Inside Sales Representatives who specialize in personal lines, group benefits, small business and individual life, disability and health insurance with strong emphasis on Risk Management, including recruiting, hiring, firing, and promoting. Design, implement, and measure quarterly team and individual goals relevant to the company strategy and focusing on individual professional growth. Create Crystal Reports for measurement and accountability purposes. Manage operations for a $10,000,000 personal lines book of business comprised of nearly 8,000 clients. Handle all aspects of joint planning with personal lines insurance carriers including agency contract review, termination and negotiation, goal setting and measuring, contingency plans, cooperative marketing ventures, and loss ratio monitoring. Perform extensive in-house company-wide training of computer applications such as Sagitta Browser, Goldmine Sales and Marketing, Internet usage, Microsoft applications, and comparative rating software. Completed process and procedure manual for servicing and sales staff. Developed sales and servicing questionnaire to complete Risk Management Plan for clients, and database of both insurance and non-insurance recommendations. Negotiated vendor partnerships.

Education

Southern New Hampshire University, pursuing B.S. Psychology est. graduation January 2025 GPA 4.0

Fisher College, Boston, MA A. S.

Achievements

2019-2023- Active member of Sakonnet Writers' Group
2019-2022- Sponsored toy drive for Dr. Martin Luther King Jr. Community Center Santa's Workshop
2022- Spearheaded first free Dental Care Clinic for Veterans on Veteran's Day providing over $16,000.00 in treatment to patients on Aquidneck Island
2011-2017- Served on the Board of Directors for the Greater Tiverton Community Chorus and acted as PR Chairperson
2014- National HUD Convention program speaker
2013- Program speaker for Tri-Town Elder Services convention
2011- Appeared on TLC's *"Hoarding Buried Alive!"* television show, as hoarding expert
2011- Appeared on WBSM, *The Pete Bradley Show,* as hoarding expert
2011- Feature article in *The Providence Journal* and *The Standard Times*
2006-2010- Volunteer as a Citizen Teacher at Citizen's Schools New Bedford Campus with middle school students enrolled in an Event Planning Community Apprenticeship. Through my leadership, the students were able to raise several thousand dollars for Buttonwood Park Zoo.
2005- Represented and spoke on behalf of the Consumer Division of The Traveling Vineyard in Dallas, TX at the annual *Harvest Convention* for wine enthusiasts
2001-2004- Recording secretary of the National Association of Insurance Women of Rhode Island
2003- Recipient of the 1752 Club CIC Scholarship Award for Insurance Professional of the Year
2003-2004- Obtained API, AIS, CIC and CPIW professional designations with a grade of Excellent in all
2003 & 2004- National Association of Insurance Women of RI, *Communicate with Confidence Speak-off* Winner, Placed Second at Nationals
2002-2004- Chairperson of the Scholarship Committee for that National Association of Insurance Women
2002-2003- Completed 12-month leadership development program with XB Coaching
2002-2003- Participate in *Leading Forward* business strategy group based on the book, *Good to Great* by Jim Collins
2002- Financial Planning Association of RI Financial Planning Expo program speaker at Bryant College