

LOUIS F. LONGO

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SUMMARY

An accomplished and creative leader with diverse experience including relationship and staff management, training and student affairs. Excellent problem resolution, interpersonal, motivation and communication skills with solid understanding of financial services and academic affairs. Seeking to leverage management experience and inspiring presentation skills to assist companies, schools, and non-profit organizations improve morale and performance.

EXPERIENCE

ENLIVEN FIRST, self-employed 2006-Present
Life Teacher

- ◆ Develop and present workshops and presentations to groups designed specifically to match their current needs and culture.
- ◆ Keynote speaker for company, educational and philanthropic events to help reach and surpass goal-setting and fundraising objectives.
- ◆ Full day workshop entitled “**Leadership and Management**” designed for current and future leaders of organizations to teach them how to successfully create and maintain inspired, productive teams.
- ◆ Provide interactive and educational programs for students, staff and families within school communities, ranging from middle school through college.

CIRCLES INC., Boston, MA 2005-2006
Director – Service Delivery

- ◆ Hired to newly created position within Service Delivery Division to provide leadership and stability to support Circles’ largest client.
- ◆ Managed a team of 100 employees and responsible for daily operations of Boston division while partnering with newly created Canadian sister-site to manage 24/7 contact center.
- ◆ **Reduced direct losses by 50 percent** by restructuring existing Member Relations Team and developing standard operating procedures in resolving client complaints, including but not limited to service recovery training and formalized tracking of incidents.
- ◆ Strengthened the stability of Service Delivery infrastructure and culture through the development of strategic partnerships with Human Resources, Business Development, Training, Finance, Marketing and Corporate IT and instilling organizational best practices.
- ◆ Partnered with Training and Human Resource Directors to develop Leadership Training for supervisors and managers.
- ◆ Represented Service Delivery on visits and conference calls while serving as primary Service Delivery contact for Quality Assurance and Marketing divisions of top client.

PUTNAM INVESTMENTS, Franklin, MA 1998-2005
Assistant Vice President/Senior Operations Manager

- ◆ Created and presented “**Career, Culture, Choices**” – a motivational and interactive presentation to encourage employees to commit or recommit to consistently delivering superior service.
- ◆ Promoted in 2001 to relationship management responsibility for Putnam’s largest single client, constituting 12% of company revenues.
- ◆ Managed a team of 40 employees in Dedicated Services, Call Center Operations, Wholesaler Support, and Processing groups, including quality assurance, training, and administrative functions.
- ◆ Responsibilities encompassed both operations and marketing, interacting constantly with the client to assure a high standard of service, to anticipate their requirements, to coordinate new product introductions, and to respond to any client issues.
- ◆ Represented Transfer Agency at Sales and Marketing events such as Advisor Due Diligence visits and served on various “Putnam Listens” panels.

- ◆ Served as key contact during market timing inquiries and provided updates to clients which helped minimize fund outflows.
- ◆ Revamped existing Employee Incentive Program, creating and publicizing new goals, standards and incentives, **resulting in a 15 percent increase in quality of work.**
- ◆ Recipient of the highly selective Putnam Leadership Award for 2002.
- ◆ Routinely visited client home offices to deliver orientation to Putnam Investments, Mutual Fund 101 training and new broker consulting.
- ◆ Chairperson of Andover facility annual Corporate United Way Campaign, responsible for all aspects of seasonal United Way fundraising and awareness efforts including company teambuilding events.

Details of earlier positions shown below are available on request.

Client Service Representative (1998-1999) **Technical Coordinator** (1999) **Supervisor** (2000)

ENDICOTT COLLEGE, Beverly, MA 1995-1998

Director of Residential Life

- ◆ Responsible for the day to day management of a comprehensive residence life program for over 700 students.
- ◆ Advisor to Endicott's Leadership Development Group responsible for preparing 3rd year students for leadership opportunities during their senior year and 4th year students for next phase of academic or professional career after graduating.
- ◆ Liaison to Career Services, Financial Aid, Campus Safety, Athletics, Dining and Health Services.
- ◆ Managed team of 30 professional and student staff to develop diverse programming calendar and enforced an educational and progressive disciplinary process.
- ◆ Partnered with Alumni Office to coordinate alumni events and gift giving campaigns.

HESSER COLLEGE, Manchester, NH 1992-1995

Director of Residential Life & Women's Basketball Coach

- ◆ Coordinated all components of residential life, including administering disciplinary sanctions, crisis intervention and student advising.
- ◆ Hired, trained, supervised and evaluated student assistants.
- ◆ Responsible for all facets of women's NNESSC basketball program as well as implemented and supervised an intramural athletic program for all students.

THE BOSTON COMPANY (MELLON BANK), Boston, MA 1991-1992

Custody Accountant

- ◆ Transfer agent for major New England banks.
- ◆ Assisted clients in maintaining their computerized ledgers.
- ◆ Performed monthly and year end financial reports.

EDUCATION AND CERTIFICATIONS

Bachelor of Science in Finance, Bentley College, 1991
NASD Series 6 and 63 Licenses

AFFILIATIONS

American Red Cross - Motivational Speaker
Bentley College Alumni Association – Executive Board
Parental Wisdom - Advisor
Pelham, NH Board of Selectmen – Liaison to Greater Salem, NH Chamber of Commerce
Pelham, NH Little League – Board of Directors
Pelham, NH Youth Basketball – Volunteer Coach
Pelham/Windham Razorbacks – Volunteer Football Coach
St Patrick School – Fundraising Committee and Substitute Teacher
Salem NH Youth Hockey – Volunteer Coach

