

JENNY CARLSON

BUSINESS OPERATIONS | SYSTEMS & PROCESS | PEOPLE LEADERSHIP | RISK & COMPLIANCE

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EXECUTIVE PROFILE

Operations leader, founder, and business builder with 20+ years creating scalable systems, leading people, and improving performance across entrepreneurial, corporate, consulting, and regulated environments. Experience spans operations, staffing and payroll, client delivery, CRM/automation, process design, quality controls, compliance, and risk. Known for finding gaps, creating practical structure, and turning variable work into repeatable operating systems.

SELECTED OPERATING SCALE & IMPACT

- **300-400 transactions annually** at peak while supporting 25-30 high-producing agents with consistent service standards.
- **8 team members** managed concurrently across distinct service functions and priorities.
- **Approximately 25 customized** StreamLine Marketing Pro implementations built on a standardized CRM/automation platform.
- **\$10K-\$15K month-over-month** business improvement in a representative insurance-office consulting engagement through training, incentives, SOPs, and quality controls.

CORE CAPABILITIES

Business Operations & Administration • 0-to-1 Operations Building • Scalable Process Design • Cross-Functional Execution • Team Leadership & Coaching • Workload & Capacity Management • SOPs & Quality Controls • CRM & Workflow Automation • Operational Risk & Compliance • Training & Change Adoption

PROFESSIONAL EXPERIENCE

StreamLine Agents, Inc. | Founder & Business Operations Lead | 2004-Present

- Built a multi-service business supporting high-producing real estate professionals through transaction operations, business support, rentals/screening, consulting, marketing, and back-office services.
- Standardized workflows, forms, communications, handoffs, documentation, quality controls, and escalation paths so a highly variable industry could still deliver a consistent client experience.
- Scaled to approximately 25-30 agents, 300-400 transactions annually, and up to 8 team members while owning hiring, onboarding, training, workload, W-2/1099 payroll, incentives, and performance reviews.
- Reduced duplication through clear job ownership, templates, checklists, and reusable processes; used volume, deadlines, recurring errors, and client issues to guide operating decisions.

SELECTED PLATFORM BUILD: STREAMLINE MARKETING PRO

- Created a GoHighLevel-based platform integrating CRM, pipelines, forms, landing pages, websites, calendars, email campaigns, automation, lead capture, and client follow-up systems.

- Implemented approximately 25 customized accounts and built repeatable onboarding with automated emails, electronic forms, templates, and staged steps to improve consistency and reduce repetitive work.

OPERATIONS, BROKERAGE & RISK LEADERSHIP

Eakin Group | Brokerage Operations, Transaction & Compliance Support | July 2023-Present

- Partner with ownership on operations, transaction management, agent support, CRM, marketing, compliance, workflow design, and day-to-day organizational problem solving.
- Identify operational and liability exposures, escalate issues appropriately, and help translate counsel-informed direction into disclosures, procedures, documentation standards, and workflow controls.

Edie West Realty Group, LLC | Business Manager & Delegated Supervisor | 2020-July 2023

- Managed brokerage operations and delegated supervisory responsibilities including compliance/file oversight, office systems, onboarding, training, staff development, agent support, and escalated problem solving.
- Built repeatable infrastructure where SOPs, onboarding, recruitment, training, and compliance plans were incomplete; created workflows, policies, accountability points, and legal-risk controls with leadership and counsel.

EARLIER OPERATIONS & CONSULTING EXPERIENCE

Small Business Consulting | Operations, Staff Development & Process Improvement | 2001-2004

- Advised small businesses and insurance offices on staffing, training, incentives, benefits, process design, SOPs, quality controls, and practical management systems.
- In one representative engagement, helped move an insurance office from negative/flat monthly change to approximately \$10K-\$15K month-over-month improvement through training, incentives, clearer SOPs, and quality controls.

Sears - Brand Central | Department Operations & Staff Leadership | Early 1990s

- Supported day-to-day training, scheduling oversight, and personnel needs for approximately 15-18 employees across appliances, electronics/phones, and floor care under the department manager.

Title Company & Insurance / Consulting - Washington | Title & Insurance Operations | 1990s

- Prepared title commitments/policies and complex rural legal descriptions requiring research, accuracy, and document analysis; also handled insurance pre-underwriting and client account responsibilities.

PEOPLE LEADERSHIP, SYSTEMS & CREDENTIALS

Hiring • onboarding • coaching • performance review • role design • incentives • skills/personality assessments • GoHighLevel • CRM platforms • workflow automation • forms/pipelines • Microsoft products • QuickBooks • transaction systems

Associate of Arts (AA), Psychology • Business studies - third year completed • Licensed Texas Real Estate Agent - TREC • GRI • RENE • SFR