

Jake O'Donnell

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Leadership and Activities

Undergraduate Assistant: Drexel Division 1 Men's Lacrosse Team, 2019

Captain: Drexel Division 1 Men's Lacrosse Team, Junior and Senior Seasons

Member: Drexel Division 1 Men's Lacrosse Team, 2015-2018

Dragon Leadership Academy, 2016-2018

Raised \$7,000 for the ALS Association of San Diego/Charlotte, 2016 and 2022

Education

Medical Sales College

Charlotte, NC

Drexel University

Philadelphia, PA

Bachelor of Science in Business Administration

Professional Experience

Cepheid

Charlotte, NC

Account Manager

September 2021 - Present

- Responsible for promoting and selling Cepheid's line of PCR Diagnostic Equipment and testing menu; including HAI's, Women's Sexual Health, Respiratory, and Oncology product portfolios. Calling on Acute and Alt-Site prospects. Fostered relationships with distribution representatives at Medline, McKesson, and Henry Schein in order to sell to our Alt-Site prospects.
- Internal Project Manager for the Sales Organization through build out of High Velocity Sales Salesforce. Collaboratively worked with teams at SaaS Solutions and Wyoming Interactive to build the most efficient CRM software for our Sales organization. Trained 23-member Virtual Sales team on new CRM; developed training material and Standard of Work.
- Built SFDC dashboards for individual Virtual Sales Team Members for Funnel and Lead Management
- Managed Inbound Lead Queue, averaging 10-15 new leads daily, qualifying 149 leads with a 74% close rate leading to \$2.8MM in revenue. Q4 2021 108% to quota, Q1 2022 118% to quota, Q2 2022 107% to quota.
- Assisted the Sales Operations team to complete over 180 Sales Ops Request Contracts over a 3-month period. Lead the Sales Operations Team in Sales Ops Request submissions during that time.
- Completed three Pediatric Visibility projects adding 328 new verified contacts for Alt-Site Sales organization.
- Cold-Called 150-200 prospects weekly
- Awards: DCX Captain of Change (Feb 2022), Make it Happen Award (April 2022)

ARS National Services

Escondido, CA

Project Manager

September 2019 to March 2020

- Managed the initiative to synchronize two independent systems for client debt management and resolved disparities between dollar settlement amounts in hard copies versus online data. Presented weekly to C-Suite Executives to provide project updates.
- Researched government website for bids on debt management and identified business opportunities; prepared analysis determining profitability. Completed RFP's and DDQ's for state and municipal qualifying bids.

Causeway Capital Management

Bryn Mawr, PA

Business Development Co-Op (4-month, fulltime position)

June 2018 to September 2018

- Underwent 6-week business development training program, refining industry best practices in presentation skills, scheduling, cultivating relationships and following up to meetings and calls, and effectively communicating the brand and the Causeway story. Assisted with the build-out of a more robust client list through prospecting and identifying new potential RIAs, Bank Trusts, and Family Offices.

Macquarie Investment Management

Philadelphia, PA

Sub-Advisory Client Services Co-Op (6-month, fulltime position)

April 2017 to September 2017

- Designed, researched, and created 30 Sub-Advisory client profiles that are utilized by the Sub-Advisory team and Macquarie Executive Management for quick reference before client meetings.
- Analyzed clients' investment portfolios to identify competitive positioning and cross sale opportunities
- Collaborated with each investment team to develop commentary for monthly, quarterly, and semiannual client investment performance reviews
- Worked cross functionally with Compliance, Legal, and Human resources teams to ensure client facing documents met regulatory and internal Macquarie standards

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