

Jeremy Sullivan Jacob

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SUMMARY OF QUALIFICATIONS

Product Manager with experience leading a cross-functional team developing proprietary social loan platform. Lead complex product and project management of proprietary loan servicing, client acquisition, partner management and financial management systems in order to streamline operations and increase organizational efficiency.

PROFESSIONAL & RESEARCH EXPERIENCE

Director of Operations

[Mission Asset Fund](#) – San Francisco, CA

Jan 2015 - Present

- Directing product management, finance and analytics departments. Managing each team's transition to new technologies, including online client application, loan servicing and accounting and analytics platforms.
- Managing Financial Associate in financial systems transition and in creating scalable financial operations. Includes both standard AR/AP and lending financial procedures, which reduced monthly loan processing time by over 60%. Efficiencies decreased servicing costs per loan by 50%, from \$120 in FY'12 to \$60 FY'14
- Managing product team in continued development of proprietary social loan platform. Strategize with leadership, conduct user research, develop requirements and direct engineering team.
- Leading team of internal and external researchers in building a framework that tracks client outcomes and financial security. Resulting tool will allow thousands of clients to holistically track their financial lives

Product and Research Manager

Mission Asset Fund – San Francisco, CA

May 2014 - Dec 2014

- Led development of proprietary client and loan management system, including revamped financial operations in order to scale social loan programs. Included managing partnerships with vendors such as Cloud Lending's loan servicing software and Citibank's API. Active monthly loan volume increased from \$65k in FY'12 to \$100k in FY'14
- Managed team of developers and designers in creation of online loan application. Worked closely with leadership and users to develop requirements and streamline enrollment and servicing processes. New system has led to more than doubling of nonprofit partnerships to 25 and 75% reduction in client time spent enrolling
- Led group of internal and external researchers in developing idea for framework that tracks clients' financial security

Research Analyst / Resident in Social Enterprise

Mission Asset Fund – San Francisco, CA

Sep 2012 - Apr 2014

- Worked directly with c-suite to design data systems to quantitatively demonstrate impact, including measurement of ongoing client outcomes and organizational efficiency. Revenue increased from \$1M in FY'11 to \$3.5M in FY'13
- Project manager for external academic evaluation that included external control groups. Primary editor, QA'd data, and created data visualizations. Published report found statistically significant effects on credit scores and debt
- Resident in highly competitive New Sector Americorps program, which assigns consultants to capacity-building projects and provides professional development training

Research Analyst (Honors Thesis)

Center for Environmental Studies – Providence, RI

Jun 2011 - May 2012

- Researched, designed and administered survey to assess consumers' willingness to pay for milk products
- Managed 6 volunteers to survey over 200 people at local supermarkets and enter data into Excel
- Ran regressions and statistical analysis using Excel and Stata and published findings: [*“Who buys Local and Organic? Comparing Rhode Island Consumers' Willingness to Pay”*](#)

EDUCATION & INTERESTS

Brown University – B.A. Economics and Environmental Studies (Honors)

2012

Technical skills: Salesforce Certified Admin, Advanced Excel, Stata, Tableau, Quickbooks, FinancialForce, Adobe CC

Languages: Spanish (Int.), VisualForce (Int.), SQL (Beg.), Java (Beg.), Python (Beg.)

Eagle Scout, Boy Scouts of America, Troop 57 – Palo Alto, CA

June 2008

Interests: Mobile photography addict, endurance junkie, amateur investor, and Sriracha enthusiast 