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Laurie Elizabeth Clark Webb

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EXPERIENCE

Operations Manager

July 2021 to Sept 2022

HUB International Mid-Atlantic, Inc.

Vice President, Operations

March 2020 to July 2021

Pete Webb Agency

Integration

Provide management and technical support during integration process to include managing all aspects of changeover for marketing and branding, full oversight for successful integration of technology and systems integration as well as successful migration of agency management system from EZLynx to Applied EPIC. During the vigorous 12-month integration period, studied and analyzed company integration process overall, using findings to design and structure M&A Integration leadership role for the newly created region.

Acquisition

Conducted financial and market analysis of prospective acquiring companies to identify opportunities for successful relationship. Assist in creation of valuation models for prospective targets. Assess underlying environment within prospect organization to determine best cultural fit and opportunity for team members. Supported due diligence process through final selection and acquisition by winning company.

Operations

Responsible for updating and modernizing the Agency's operational activities in anticipation of ultimate acquisition. Of mention: Managed outside IT vendor to improve security of network environment and develop adequate processes and systems to support permanent remote work capabilities. This effort resulted in 100% success rate for timely transition to work from home at the start of the pandemic. Expanded marketing and communication initiatives to include brand development, multi-media campaigns that included digital and traditional components such as radio and print, social media campaigns, and collaboration with and utilization of carrier programs. In terms of business development, this work resulted in an increase of local market share by 25% based on increase in measured traffic resulting in successful account closings. Worked with outside legal counsel to update employee handbook and HR documentation. Updated compliance procedures to align with multiple carrier standards. Managed relationship with agency management system requiring updates to contractual terms and system modules.

Director of Administration and Operations

Cartica Management, LLC

March 2008 to September 2019

Cartica Management, LLC is a D.C. based asset management firm of 45 employees with assets under management reaching \$3.5 billion, focused exclusively on small and mid-cap companies in the emerging markets. Founded by a team of leading experts in emerging markets and corporate governance, the firm actively engages with management teams, boards, and shareholders to drive long-term, value enhancing improvements in corporate governance, environmental and social factors.

As a member of the founding team, successfully developed and managed key operational details during start-up and first rounds of growth. Managed expansion and transition of strategic organizational programs to handle ongoing operational growth.

Compliance and IT

- Organized and managed plan to meet initial compliance functions to include managing employee disclosures, auditing employee communications under regulatory guidelines, facilitating annual compliance reviews as well as preparing and submitting quarterly and annual filings. Successfully transferred responsibilities with direct hire of designated compliance officer.
- Lead manager, annual compliance reviews and mock audits. Developed methodology to organize, track, and catalog organizational information into a uniformed format that supported compliance reviews and mock audits. Vendor adopted this methodology to better serve their client base.
- Managed critical communications with consulates and federal agencies on matters concerning authorizations for travel within various countries.
- Managed process and communications for filings of official documents with foreign countries and within the U.S. to include authentications and filings with numerous consulates, government agencies and the Department of State.
- Produced comprehensive project and department updates to the firm's board of directors. Assisted COO in managing all details pertaining to the board including managing meetings, agendas, and materials. Managed personal disclosure and regulatory requirements of board members.
- Developed and implemented initial strategy for regulated IT and compliance functions.
- Managed all aspects of IT environment, including issuance of RFP for managed services, review, award, and vendor management. Efficient transition of responsibilities upon onboarding of IT Director.
- Discovered egregious error caused by "big 3" software company which resulted in the deletion of critical back up data. Identified issue and successfully negotiated financial settlement.
- Developed and maintained business continuity disaster recovery (BCPDR) requirements to meet ever changing and regulatory demands.
- Decision maker and lead during extended city-wide outage requiring activation of full-scale business continuity plan.

Client Services and Marketing

- Built and managed Client Services program from inception to include management of day-to-day client communications and requests for information. Successfully transferred responsibilities with hiring of designated investment relations professionals.
- Led website development and managed relationships with vendors. Three site iterations over ten years to include consideration of regulatory requirements and marketing restrictions unique to the industry.
- Collaborated with firm principals and investment team to develop and manage marketing materials and communications resulting in improved efficiency during marketing roadshows. Developed initial approach for managing client and marketing pipeline using metrics and reporting analysis.
- As a cross-functional effort, orchestrated production and distribution of official presentations such as investor decks, quarterly updates and letters, RFPs, and due diligence requests. Responsible for editing and review, final formatting and set up. Last line of defense to ensure that all materials representing the company were precise. Managed onsite due diligence and audit reviews by current and prospective investors.

Facilities and Logistics

- Developed successful program for managing and monitoring over 15 million miles of complicated international travel to ensure mission success. This included development of strategic relationships with numerous vendors and industry professionals and resulted in 100% mission safety rate despite multiple occurrences of environmental adversity.
- Collaborated with principals in developing and implementing travel policies designed to effectively support teams during travel. Influenced executive team regarding automation of expense and travel reporting. Directed selection, implementation, and training of program. System has allowed for better efficiency of administrative staff and improved accuracy in reporting.

- Managed all aspects of office relocation and \$3 million buildout. Provided full oversight of brokerage, design, and contracting teams. Finished suite became a marketing showcase for use by landlord and contractors alike.
- Vendor selection and management for all office facilities, equipment, and services.

Administration, HR, and Company Culture

- As direct manager of the administrative team grew program and functions from inception to permanent roles with a candidate success rate of 75%.
- Developed HR processes, recruiting and testing procedures as well as a comprehensive program for tracking non-exempt employee time. Additionally, created the foundation for the firm's performance improvement plan (PIP).
- Led management of U.S. right to work permits. Worked with outside counsel to manage complex process including applications, tracking, and withdrawals of multiple H1-B, TN and other permit conditions.
- Crafted initial civic response programs. Developed relationships with Capital Area Food Bank and Martha's Table and launched CarticaCares. Initial efforts resulted in our group providing meals to over 350 DC families as well as several hundred gifts collected during Toys4Tots and full commitment of firm's principles for continuation of program.

Founder and President

October 2002 to February 2008

The Sadie Group, LLC dba Bonnie Greer & Co.

(secondary business) October 1999 to September 2002

Created energetic and favorable workplace and developed a culture promoting the community it served while building brand loyalty with its customers. Led strategic partnership of community businesses and organizations in Alexandria, VA to develop flagship neighborhood into a vibrant Main Street USA. This collaborative and cross-functional effort established a new identity for the neighborhood of DelRay and brought new vibrancy to this community in terms of the quality of businesses. These efforts were the beginning stages in revitalizing the DelRay neighborhood of Alexandria, VA into what is known today as one of the best neighborhoods in the country.

- Achieved a 250% increase in revenue during the first two years in operation.
- Retail concept store for high profile gift and furniture product lines.
- Managed product and vendor selection. Negotiated favorable terms on key product lines.
- Full operational control of three locations within the greater DC metro area.
- Working with various business associations, the Mayor, and City Council offices as well as the Alexandria Convention and Visitors Association, took leadership role in the community marketing programs for the City of Alexandria. This work was the steppingstone to the city-wide collaboration between neighborhood business associations, civic associations, local businesses and agencies and the momentum used in developing a dynamic and economically developed area.
- Spearheaded design and implementation of the first multi-media holiday campaign for the Del Ray neighborhood entitled "Holiday on the Avenue." This program has been adopted and used as the basis for other city-wide programs. The first run of the program attracted a variety of high-profile visitors including Southern Living Magazine, Washington Post and initial visit by First Lady Laura Bush. The campaign resulted in an average sales increase for participating businesses of 65% to 115% compared to the previous holiday season.
- Prepared and submitted the first successful RFP under the City of Alexandria's matching dollars program on behalf of the Potomac West Business Association now known as the Del Ray Business Association. This grant provided the fuel necessary to generate the highly effective collaborative efforts that this area experiences today.

Project Manager

Capital One Financial Corporation

July 1996 to September 2002

Recruited to assist executive vice president in charge of establishing original entity for deposit products. Upon completion of bank formation and launch of initial deposit product line, moved into role developing and managing the Community Reinvestment Act (CRA) regulatory program.

- As CRA Project Manager, led and partnered with cross-functional teams to design and launch internal systems. Successful outcome required managing the project across a variety of complex functions and using metrics to determine direction of overall program.
- Aligned business units with community groups to aid in the success of community driven programs.
- Shaped corporate commitment of resources for development and maintenance of CRA efforts.
- Developed pipeline of qualified CRA projects and created detailed plan for implementation resulting in a shorter turnaround to closing and substantial reduction of time required by legal team.
- Built strategic relationships within the community as a focused approach to addressing multiple regulatory requirements under CRA, as well as in support of corporate charitable initiatives and employee demand for volunteering.
- Collaborated with corporate communications and community relations to develop the community mission for the corporation.
- Active with professional organizations and conferences to develop relationships, resource base and ultimate pipeline of qualified CRA investments.
- Managed grant budget of \$1 million and community investment budget of \$25 million.
- Member of due diligence team conducting research of initial deposit portfolio for original deposit taking entity.
- Provided communication points and updates to the CEO and President.
- Prepared and managed presentations to board of directors, department heads, and regulators. Ability to understand the underlying mission of business allowed for enhanced proficiency in presentation preparation and general communications.

Training Developer

Savannah River Site (Concord Associates / General Physics)

1993-1995

Project Manager, Business Development / Information Systems Manager

Business Manager Research Associates

1988-1993

Chief of Staff / Office Manager

Robert & Meiser, P.C.

1984-1988

CERTIFICATIONS / TRAINING / EDUCATION

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| Project Management Institute | Professional Project Manager (PMP) Certification (October 2022) |
| Project Management Institute | Agile Certified Practitioner (PMI-ACP) Certification (November 2022) |
| Virginia SCC Designation | Property & Casualty Insurance License |
| Augusta College/NVCC | Business Administration Core Work |