

JEREMY FLANAGAN, PMP

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Project Manager | AI Implementations and CRM Automation

Professional Summary

PMP-certified project manager, managing projects since 2009 and now Director of Delivery (contract) at an AI implementation consultancy. Serve as the primary client contact from discovery and statement of work through a supervised AI pilot, translating business goals into scope, pricing, developer briefs, and completion criteria. Hands-on with Keap (Infusionsoft) CRM since 2009, with experience building and testing software using AI coding tools. Known for laying out clear options when scope, schedule, and stakeholder demands collide.

Professional Experience

Director of Delivery (Contract) – DIAL Systems – AI Implementation Consulting 04/2026 – Present

- **Primary engagement contact named on every SOW**, running weekly client working sessions and coordinating delivery with company leadership and a team of about 4 developers.
- **Lead client discovery with business owners and leadership teams**, identifying the core problem behind the initial request and translating it into requirements, phased scope, and success criteria.
- **Lead proposals and statements of work**, defining scope, deliverables, phases, schedules, and pricing from developer hour estimates. Co-developed the firm's standardized proposal framework.
- **Manage engagements from paid discovery through fixed-price build and supervised AI pilot**, defining completion criteria and keeping clients and developers aligned on scope and schedule.
- **Helped build the firm's delivery practice**, designing processes for deadlines, scope reviews, and retrospectives, and proposing a formal change-request process.

Independent Consultant – CRM Automation, AI Tools, and Operations 2024 – Present

Selected engagement: Book Award Mastery (01/2026 – Present)

- Captured the founder's award-research process and selection criteria, and encoded them in a matching engine I designed and built with AI coding tools. Covers 81 award programs and is used to deliver client reports.
- Built the workflow from intake through automated categorization, staff review, PDF reporting, and Slack approval. Built and maintained a comprehensive automated test suite, and prepared a developer handoff package.

Other engagements

- Built advanced Keap, Zapier, and SamCart automations for a publishing and education client, with written documentation for each build.
- Built a role-based Google Drive documentation system with 15 permission groups for a coaching and consulting firm.
- Consulted with Perry S. Marshall & Associates on an hourly contract basis since 03/2026.

Perry S. Marshall & Associates – Marketing Strategy Consulting and Training 03/2004 – 03/2026

Advanced from customer service agent to Director of Operations on a 12-person team, managing up to 5 projects concurrently.

Director of Operations 10/2023 – 03/2026

- **Led the Equity 2.0 Seminar (04/2025)**, the firm's flagship event, with 10+ staff, contractors, A/V vendors, and joint venture partners. Met every milestone despite late-stage scope expansion. 80+ in-person and 81 livestream attendees; campaigns generated 1,000+ leads.
- **Coordinated an AI knowledge project (2024–2026)** that made 30 years of the founder's work usable by AI systems. Translated the founder's goals for digitization and retrieval specialists, integrated the resulting workflows into operations, and trained the team.
- Managed the membership-platform and webinar-platform migrations, reported operating KPIs weekly to the CEO and executive team, and maintained website PCI compliance.

Marketing Manager

01/2016 – 10/2023

- Ensured the annual and quarterly marketing plans were created, contributed to them, and owned execution and reporting against them.
- **Owned end-to-end execution of 30–40 promotions and 5–10 live events a year** in the firm's busiest years: translated each plan into a promotion calendar, broke every promotion into tasks with owners, and managed it through execution, documentation, and a post-mortem.
- Built the launch infrastructure for each promotion: products, purchase and fulfillment automation, e-commerce funnels (order forms, one-click upsells), members-area pages, and client access.
- Tasked out email and sales-letter copy, set up direct mail campaigns, and planned and implemented all launch communications (access emails, live-session reminders, replay notifications).
- Coordinated joint venture and affiliate partners, and ran webinar operations and marketing performance tracking.

Project Manager

08/2009 – 01/2016

- Took over the Keap (Infusionsoft) implementation after the initial migration, and managed CRM, sales-funnel, and automation build-out and ongoing maintenance.
- Assigned work across project, IT, and creative teams, and kept sales, creative, and leadership stakeholders aligned.
- When CEO requests could not be met as scoped, laid out the trade-offs and options.
- Implemented and maintained standardized project documentation and knowledge management.

Customer Service Manager

01/2005 – 08/2009

- Hired and managed a team of 3.
- Set customer service policies, training, and performance indicators.

Customer Service Agent

03/2004 – 01/2005

Skills

- **Delivery:** Client discovery, requirements documentation, statements of work, pricing from developer estimates, scope and schedule management, trade-off and risk escalation, developer briefs, pilot completion criteria, software testing, team training
- **Platforms:** Keap / Infusionsoft, Zapier, SamCart, PlusThis, Claude, ChatGPT, Microsoft Teams and Planner, Google Workspace, Slack, Wrike

Additional Experience

- Associate Pastor – Oasis of Light Church, San Antonio, TX | 2009 – 2018

Education and Certification

Project Management Professional (PMP) – Project Management Institute (PMI), 2026

Bachelor of Science, Computer Information Systems, Cum Laude – Dominican University, River Forest, IL, 2004