



JAMES

VIDEO INTERVIEW

EXPERTISE SKILLS

- Executive Assistance
- Administrative Support
- Email Management
- Calendar Management
- CRM Management
- Travel Coordination
- Scheduling Coordination
- Customer Service
- Client Communication
- Client Relationship Management
- Bookkeeping Support
- Basic Bookkeeping
- Expense Tracking
- Data Entry
- Report Preparation
- Documentation Management
- Social Media Management
- Outbound Calling
- Meeting Coordination
- Workflow Optimization
- Process Improvement
- Confidential Information Management
- Task Prioritization

TOOLS

- Mailchimp
- Practice Better
- QuickBooks Online
- Google Workspace
- Microsoft Office Suite
- Canva
- Zoom
- Slack
- Meta (Facebook & Instagram)
- Zapier
- Asana

Results-driven Virtual Assistant with 5+ years of experience providing executive support, administrative coordination, CRM management, bookkeeping support, and client communication in fast-paced remote environments. Proven track record of managing executive calendars and inboxes, coordinating travel and meetings, maintaining CRM systems, supporting bookkeeping tasks with QuickBooks, preparing reports, and streamlining administrative workflows to improve productivity and executive efficiency. Brings strong expertise in executive assistance, calendar and email management, data entry, CRM administration, bookkeeping support, process improvement, and remote collaboration tools, helping organizations optimize daily operations, enhance communication, and deliver reliable, high-quality business support.

WORK EXPERIENCE

EXECUTIVE ASSISTANT

Athena | September 2024 – June 2026 (1 Year, 10 Months)

- Provided high-level executive support through inbox and calendar management, meeting coordination, task prioritization, report preparation, and documentation. Managed confidential information with discretion, collaborated with cross-functional teams, and implemented process improvements to enhance executive productivity and operational efficiency.

EXECUTIVE ASSISTANT/VIRTUAL ASSISTANT

The Cookies Co | January 2023 – April 2026 (3 Years, 4 Months)

- Managed executive calendars and inboxes, coordinated business and personal travel arrangements, supported bookkeeping tasks using QuickBooks, maintained CRM databases, handled client communications and follow-ups, assisted with social media management, and streamlined administrative workflows to improve day-to-day operations.

VIRTUAL/EXECUTIVE ASSISTANT

Sphere Rocket VA | March 2024 – July 2024 (5 Months)

- Managed email inboxes, coordinated meetings across multiple time zones, conducted outbound calls, maintained CRM systems including Mailchimp and Practice Better, prepared weekly and monthly reports, provided client care and relationship management, and supported administrative and social media activities.

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