

Tully J. O'Neill

Legal & Compliance Project Management Specialist

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Summary

Extensive knowledge in compliance, legal, communications, and project management acquired through years of experience. Established record of implementing technology solutions, process enhancements, and promoting cross-team cooperation. Recognized for delivering impactful results through the accolade "People of Aspiration" and the "Above and Beyond" award from AllianceBernstein.

Work experience

PIMCO, Senior Associate- Marketing Operations

07-2022 - 04-2024

Newport Beach, CA

- Interfaced with Product Management, Design, Compliance, Legal, and the Data teams to maintain and update a variety of marketing materials, including reports, fact sheets, quarterly commentaries. These items were showcased on the PIMCO website, app, social media, and in print.
 - Cataloged marketing materials, analyzed download metrics, and quantified each item's ROI. After, eliminated or consolidated underutilized items, resulting in effective use of limited resources, strategic and efficient project plans plus reduction in confusion.
 - Led project status meetings, facilitated communication, and conducted root cause analysis for a portfolio of projects yielding better collaboration, smoother launches and increased team synergy.
 - Harnessed Sales Team's KPI data to quantify the impact of all marketing materials, facilitating the creation of strategic launch plans that prioritize high-revenue-generating items and contribute to the attainment of sales targets.
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Aspiration, Compliance Project Manager

08-2019 - 03-2022

Marina del Rey, CA

- Acted as the liaison for the Legal and Compliance team during the company's weekly cross-functional gatherings, delivering crucial updates and documenting valuable insights to ensure our team remained well informed.
 - Collaborated with Compliance and Legal colleagues plus, Senior stakeholders to ensure product launches and restages complied with banking partner rules and laws, whilst keeping diligent records for auditing purposes.
 - Proposed Content Management System for the company and created the first iteration in a Google Sheets. This resulted in increased efficiency by determining priorities, fewer errors, and savings from outsourced headcount.
 - Summarized over 270 FINRA letters and other regulatory information which was posted to an internal Confluence page. This resource enhanced colleagues understanding of guidelines and increased speed to market production.
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Goop, Compliance Project Manager

10-2018 - 06-2019

Santa Monica, CA

- Facilitated the creation and execution of the Goop Compliance program for third-party and Goop-branded items by gathering supporting evidence for claims and ensuring the legal team was making effective decisions.
 - Supervised and analyzed customer complaint trends in comparison to sales volume. If a specific benchmark incurred, an investigation with subsequent resolution plans commenced to ensure customer satisfaction.
 - Minimized risk for emerging market items by implementing guard rails such as an interstitial jump page for a CBD editorial sales partnership, resulting in substantial revenues and reduced legal exposure.
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AllianceBernstein, Project Manager- North America Sales Group

02-2016 - 04-2018

New York, NY

AllianceBernstein is a research-driven investment firm serving institutional & retail clients. I earned two promotions during my seven year tenure.

- Managed the Salesforce / Extensify sync, which helped Senior leaders quantify the ROI of the Sales team's prospecting efforts VS the expenses for courting prospective clients. These data points enabled more strategic and impactful and fiscal decisions for the firm.
 - Partnered with Sales Advisors to develop marketing activities, resulting in an increase in sales and brand awareness.
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AllianceBernstein, Associate- Advisor Institute

09-2014 - 02-2016

New York, NY

- Analyzed 35 salespeople's usage of M.D. and Director's time, resulting in a 33% profit increase.
 - Sourced industry resources and attended competitor meetings which was the foundation for the Managing Director's "Robo Advisor" White Paper. Upon completion, ensured material's compliance with FINRA regulations and legal standards which facilitated client needs and, increased revenue.
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AllianceBernstein, Senior Assistant to Partner

04-2011 - 09-2014

New York, NY

- Supported C-Suite leaders with effective time management, confidential matters, client facing meetings, presentations and other duties.

L'Oréal USA, Artwork Project Manager - Consumer Products Division

New York, NY

● Tracked artwork progression for promotion, launch and value analysis of four consumer brands.

01-2010 - 04-2011

L'Oréal USA, Artwork Coordinator - L'Oréal Paris Promotions

New York, NY

● Managed art routing process for promotional packaging plus displays of L'Oréal Paris' four categories.

09-2007 - 01-2011

Levi Strauss & Co, Associate - Presence and Publicity

New York, NY

● Reported editorial and stylist requests to the design teams in order to maintain the brands innovation. packaging plus displays of L'Oréal Paris' four categories.

03-2005 - 09-2007

Education

University of California, Irvine

Certification - Intensive Project Management review

Irvine, CA

2021-07 - 2021-09

F.I.T.

B.S. Advertising, Marketing, and Communications

New York, NY

2001-08 - 2005-05

Skills

Project Management	Process enhancements
Guidance stems from PMP PMBOK Guide and I am cognizant of all methodologies. Documentation of processes plus, maintaining their updates and keeping all informed is crucial as well. Utilize this skill via the tools Atlassian, Confluence, Jira, Microsoft Project, OneNote, SmartSheet, and Trello.	Able to measure current state of affairs and suggest, gain approval for and initiatives. Accomplished via cultivating data points for quantitative analysis. populating ROI, KPI and interviewing stakeholders for qualitative data. Data points are analyzed via the tools Looker, Sharepoint, Excel, Google Sheets, Access, Google Survey and more.
Legal, Compliance, AML and Audit	General Skills
Extremely adept at drafting legal disclaimers and handbooks. Able to summarize large pieces of information for Senior Leaders to opine on. AML investigations have resulted in apprehension of multiple criminals. Documentation and organization of a project's lifecycle is housed via via Red Oak / AdMaster and Box which is retrieved for audits , AML is via the program ComplyAdvantage.	Extremely strong people management skills and have experience with C-Suite Team leaders, cross collaboration with colleagues and, acting as a spokesperson for my team at Company wide meetings. Time Management is tracked via Toggl, Outlook, Microsoft Office Suite and, communication is via Slack, Microsoft Teams, Zoom and other tools.

Achievements

- Alliance Bernstein's "Above and Beyond" award
- "People of Aspiration" award from Aspiration