

DONALD NOWLAND

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PROFESSIONAL SUMMARY

Seasoned cross-functional expert with extensive experience in onboarding, client relations, and payroll solutions at Intuit. Demonstrated proficiency in organizing and time management, facilitating efficient client onboarding into QuickBooks Online Elite Payroll. Success in collaborating with multiple teams and strategic partners underscores the ability to lead complex payroll processes and provide technical support. Tailored training delivery and innovative solution development position well for the Senior Service and Support Specialist role, emphasizing a client-focused approach.

SKILLS

- Customer Onboarding
- QuickBooks Online Elite Payroll Proficiency
- Cross-functional Collaboration
- Process Improvement (RPA Tools: UiPath, Workato)
- Project Management
- Client Relationship Management
- Regulatory Compliance
- Training and Development
- Strategic Partnerships
- Analytical Thinking
- Time Management
- Technical Support
- Software Proficiency

EXPERIENCE

10/2024 to Current **Certified Citizen Developer**

Intuit — Pennsylvania, United States

- Developed and implemented RPA solutions using UiPath and Workato, reducing manual tasks and improving efficiency
- Worked with various teams to identify and prioritize processes suitable for automation
- Created, tested, and deployed automation workflows, leading to increased productivity
- Maintained and updated deployed RPA bots for optimal performance
- Documented the automation process from start to finish for clarity and future reference
- Trained and supported end-users to ensure effective adoption of automation tools

08/2024 to Current **Senior Associate Onboarding Specialist**

Intuit — Pennsylvania, United States

- Guide new customers through the onboarding process by collecting necessary business and payroll information

- Ensure compatibility and fulfillment of customer needs using QuickBooks Online Elite Payroll
- Educate customers on the onboarding steps, software usage, and functionalities to optimize their experience
- Collect and analyze reports and documentation essential for building compliant customer accounts
- Lead customers through their initial payroll setup and inform them about available post-onboarding support resources
- Educate customers on additional value-added services from Intuit and partners, including QB Time, Guideline 401 (k), and insurance options
- Mentor and assist fellow onboarding specialists to enhance team expertise and performance
- Collaborate with leadership on executing special projects that contribute to business unit goals
- Provide support for the team and managerial operations during their absence, ensuring continuity of service

04/2024 to Current Learning Facilitator

Intuit — Pennsylvania, United States

- Collaborate with business unit leaders and stakeholders to identify and assess training needs
- Partner with Learning and Development teams to ensure relevant content is available for training sessions
- Communicate effectively with leadership to address and resolve training concerns and needs
- Utilize various systems and tools to provide learners with necessary resources for success
- Foster an inclusive learning environment, adapting delivery methods to accommodate different learning styles

03/2022 to Current Verizon Business Agent

Self-Employed — Factoryville, United States

- Upsold customers by recommending accessories and promotions to increase revenue
- Built diverse and consistent sales portfolio
- Demonstrated proficient product knowledge to customers and provided detailed product information
- Identified new business opportunities through cold calling, networking, marketing and database leads
- Assisted customers in determining cellular phone needs by asking open-ended questions, clarifying advantages and disadvantages of each product and explaining products by ratings

03/2021 to Current Notary Public

Self-Employed — Pennsylvania, United States

- Checked documents and identifying credentials for all parties

- Looked for signs of fraud or coercion and refused notarization
- Examined documents for accuracy, completion and compliance before notarizing
- Administered oath to document signers to obtain affirmation of truth
- Drafted and executed notarial affidavits in accordance with applicable laws
- Maintained accurate records of all documents notarized to support accurate recordkeeping and reporting requirements

08/2015 to Current Social Media Coordinator

J.R's Hallmark — Tunkhannock, United States

- Wrote social media content to increase engagement with customers
- Created social media content with consistent content and tone
- Increased customer engagement through social media
- Monitored advancements in social media and technology, working with marketing teams to adopt new platforms and facilitate integration into marketing plans

08/2015 to Current Retail Sales Associate

J.R's Hallmark — Tunkhannock, United States

- Greeted customers and helped with product questions, selections, and purchases
- Balanced and organized cash register by handling cash, counting change, and storing coupons
- Used POS system to process sales, returns, online orders, and gift card activations
- Maintained up-to-date knowledge of store sales, payment policies and security standards
- Monitored sales floor and merchandise displays for presentable condition, taking corrective action such as restocking or reorganizing products

07/2006 to Current Freelance Bookkeeper

Self-Employed — Pennsylvania, United States

- Established QuickBooks accounting system to reflect accurate financial records
- Tracked expenses and income for businesses while organizing and maintaining bank statements for checking accounts
- Developed and implemented procedures to improve accounting efficiency
- Reconciled and corrected issues with financial records
- Reduced financial discrepancies through transaction monitoring and management
- Used knowledge of local laws to comply with reporting requirements
- Analyzed financial data to assist in budget creation and forecasting

07/2006 to Current Freelance Tax Preparer

Self-Employed — Pennsylvania, United States

- Completed and filed returns with tax departments at local, state, and federal levels
- Contacted IRS or other relevant government organizations on behalf of client to address issues related to tax self-preparation
- Reviewed client's tax filing papers thoroughly to determine eligibility for additional tax credits or deductions
- Consulted with clients to assess and mitigate future tax liabilities and determine eligibility for tax abatement
- Prepared tax returns for clients in various industries according to government regulations and requirements
- Maintained complete records of client tax returns and supporting documentation in secured areas

07/2006 to Current Freelance Graphic Designer

Self-Employed — Pennsylvania, United States

- Developed creative design for print materials, brochures, banners, and signs
- Worked with clients to gather and define requirements, establish scopes, and manage project milestones
- Applied knowledge of production to create high-quality images
- Employed design fundamentals when selecting typography, composition, layout, and color in design work
- Met with customers to present mockups and collect information for adjustments
- Created digital image files for use in digital and traditional printing methods

07/2006 to Current Freelance Web Designer

Self-Employed — Pennsylvania, United States

- Identified conflicting business practices and integration issues to suggest alternative solutions
- Provided technical consulting support on projects or system issues
- Verified system integrity by utilizing proper architectural designs
- Evaluated application software packages and made recommendations to management
- Implemented changes and integrated requested elements to streamline business operations
- Engaged with clients to plan and optimize site issues and queries

07/2006 to Current Freelance Consultant

Self-Employed — Philadelphia County, United States

- Collaborated closely with clients to better understand entire project scope
- Delivered outstanding service to customers to maintain and extend

- relationships for future business opportunities
- Supported clients with business analysis, documentation, and data modeling
 - Liaised with customers, management, and sales team to better understand customer needs and recommend appropriate solutions
 - Prepared presentations to explain revisions, enhancements, and process improvements of the organization's systems and programs
 - Organized and analyzed primary and secondary research to understand the industry, market, and company trends
 - Analyzed problematic areas to provide recommendations and solutions

05/2023 to 08/2024 Associate Onboarding Specialist

Intuit — Pennsylvania, United States

- Guide new customers through the onboarding process, collecting essential business and payroll information
- Ensure customer needs are met using QuickBooks Online Elite Payroll and identify solutions for specific requirements
- Educate customers on the onboarding process and software utilization, ensuring a smooth transition
- Collect necessary reports and documentation to build accurate and compliant customer accounts
- Assist customers in running their first payroll and provide education on ongoing support resources
- Educate customers about value-added services offered by Intuit and strategic partners, including QB Time, Guideline 401(k), Allstate Insurance, and Next Insurance for Worker's Compensation

02/2018 to 02/2023 Blended Case Manager

The Burke Center, Inc. — Tunkhannock, United States

- Managed support services and fostered communication among social workers, therapists, provider agencies, and patients
- Took active role in patient and family planning process, detailing instructions, and responding appropriately and effectively to questions and concerns
- Worked with different disciplines to provide cohesive care to patients
- Updated patient charts with data such as medications to keep records current and support accurate treatments
- Adhered to established rules, ethical standards and codes of professional conduct conducive to positive learning atmosphere
- Partnered with physicians, social workers, activity therapists, nutritionists, and case managers to develop and implement individualized care plans and documented patient interactions and interventions in electronic charting systems
- Coordinated services with other agencies, community-based organizations, and healthcare professionals to provide useful benefits to

clients

01/2016 to 02/2023 Revenue Cycle Manager

The Burke Center, Inc. — Tunkhannock, United States

- Monitored and guided revenue cycle operations
- Supported clinical team members with revenue cycle procedures and addressed issues
- Completed financial reporting and analysis for billing revenue cycle
- Assessed current revenue cycle procedures and implemented improvements to foster efficiency

01/2016 to 02/2023 Credentialing Coordinator

The Burke Center, Inc. — Tunkhannock, United States

- Communicated effectively with various parties each day using polished interpersonal and active listening skills
- Tracked expiration dates on documents and communicated with appropriate staff to avoid late filing
- Maintained accurate files, records and credentialing documents in well-maintained databases using CAQH
- Worked closely with practitioners to help each obtain privileges at assigned healthcare facilities
- Assisted with managed care auditing processes and performed internal file audits
- Enrolled providers and Medicaid, Medicare and private insurance plans
- Prepared records for site visits and file audits

01/2016 to 02/2023 Human Resources Manager

The Burke Center, Inc. — Tunkhannock, United States

- Maintained company compliance with local, state, and federal laws, in addition to established organizational standards
- Maintained payroll and benefits for employees in various locations and diminished financial discrepancies through expert program management
- Facilitated onboarding sessions and on-the-job training for new hires, bolstering employee job position knowledge and skillset
- Monitored and handled employee claims involving performance-based and reported incidents
- Coordinated employee grievances and disputes in timely and professional manner by finding constructive solutions
- Recruited top talent to maximize profitability
- Identified and implemented appropriate strategies to increase employee satisfaction and retention

01/2016 to 02/2023 Operations Director

The Burke Center, Inc. — Tunkhannock, United States

- Mentored and supervised diverse workforce, managing scheduling,

- supervision and performance management
- Strengthened product branding initiatives by coordinating marketing strategies to optimize outreach
- Boosted customer satisfaction ratings by resolving issues quickly and effectively
- Collaborated with executives to develop and execute strategic business plans

01/2016 to 02/2023 Practice Manager

The Burke Center, Inc. — Tunkhannock, United States

- Addressed and remedied all patient or team member issues
- Consulted with healthcare professionals on business decisions
- Provided outstanding support to entire staff which helped improve process flow and boosted efficiency
- Developed policies and procedures for effective practice management
- Developed close working relationships with front office and back office staff
- Supervised team of five office personnel
- Communicated closely with patients, ensuring medical information was kept private

01/2016 to 02/2023 Medical Billing and Collections Specialist

The Burke Center, Inc. — Tunkhannock, United States

- Compiled and tracked outstanding balances owed to medical facilities
- Corrected, completed and processed claims for multiple payer codes
- Logged charges and payments within AdvancedMD
- Assisted in reconciling deposit and patient collections
- Processed billing calls and answered questions from patients and third-party carriers
- Processed online and paper appeal submissions and refund requests
- Used data entry skills to accurately document and input statements
- Generated monthly billing and posting reports for management review
- Monitored outstanding invoices and performed collections duties

05/2017 to 03/2018 Campground Manager

Cozy Creek Family Campground — Tunkhannock, United States

- Assigned work to staff, set schedules, and motivated strong performance in key areas
- Cultivated strong relationships with customers to build loyalty and repeat business
- Restored customer loyalty by resolving complaints with workers, activities or services rendered
- Conducted research and analysis of market trends to determine potential opportunities for growth
- Developed partnerships with external vendors and suppliers to obtain

quality products and services

11/2014 to 05/2017 Direct Support Professional

Wyoming County Special Needs Association — Tunkhannock, United States

- Maintained clean, safe, and well-organized patient environment
- Monitored progress and documented patient health status changes to keep care team updated
- Assisted clients with daily living needs to maintain self-esteem and general wellness
- Updated patient files with current vitals, behaviors, and other data relevant to treatment planning
- Assisted disabled clients to support independence and well-being
- Developed rapport to create safe and trusting environment for care

11/2014 to 05/2017 Office Coordinator

Wyoming County Special Needs Association — Tunkhannock, United States

- Managed office activities by maintaining communication between clients, tracking records, and filing all documents
- Interacted with customers by phone, email, or in-person to provide information
- Answered and managed incoming and outgoing calls while recording accurate messages for distribution to office staff
- Maintained office supplies inventory by checking stock and ordering new supplies

08/2011 to 11/2014 Outbound Sales Specialist

Solid Cactus, Inc. — Dallas, United States

- Developed & implemented a successful outbound sales department
- Made 100 cold calls per day resulting in client base growth by 25%
- Contacted customers after the sales process to drive ongoing customer satisfaction and resolve issues and complaints
- Collaborated and communicated across organizational levels to derive new strategies for reaching a broad range of customers and document progress
- Analyzed customer data and sales trends to develop targeted sales campaigns
- Used computer databases to keep track of phone calls, confidential notes about conversations and customer contact information

08/2011 to 11/2014 Account Manager

Solid Cactus, Inc. — Dallas, United States

- Achieved sales goals and service targets by cultivating and securing new customer relationships
- Maintained up-to-date knowledge of available products to best serve customers and maximize sales potential
- Answered customers' questions regarding products, prices, and

- availability
- Addressed problems with accounting, billing, and service delivery to maintain and enhance client satisfaction
- Determined needs, delivered solutions, and overcame objections through consultative selling skills
- Built and strengthened long-lasting client relationships based on accurate price quotes and customer-centric terms

EDUCATION

Expected in 03/2027 Bachelor's of Science: Information Technology
Western Governors University

Expected in 03/2027 Master's of Science: Information Technology Management
Western Governors University

06/2007 High School Diploma: General Studies
Tunkhannock High School — Tunkhannock

PORTFOLIO

- www.linkedin.com/in/dnowland21

CERTIFICATIONS

- UiPath Certified Citizen Developer
- Workato Automation Pro I
- Workato Automation Pro II
- Smartsheet Core Certified
- Quickbooks Certified Advanced ProAdvisor
- Quickbooks Certified ProAdvisor Payroll
- Quickbooks Certified ProAdvisor
- Foundations of Project Management
- Intuit Academy Bookkeeper Certification
- Cisco Collaboration SaaS Certified