

PRIVATE AND CONFIDENTIAL

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CIVIC LEADERSHIP

INTERNATIONAL ASSOCIATION OF LEGAL ADMINISTRATORS

DIRECTOR OF THE BOARD INTERNATIONAL ASSOCIATION OF LEGAL ADMINISTRATORS

ASSOCIATION LEVEL CHAPTER RESOURCE TEAM

AUSTIN CHAPTER PRESIDENT

AUSTIN CHAPTER PRESIDENT-ELECT

AUSTIN CHAPTER TREASURER

AUSTIN CHAPTER COMMUNICATIONS CHAIR

2026 ASSOCIATION PRACTICE AREA
CONFERENCE PLANNING COMMITTEE

2027 ASSOCIATION ANNUAL CONFERENCE
PLANNING COMMITTEE

OPERATIONAL EXCELLENCE & INNOVATION STRATEGIST

Accomplished C-Suite Officer with a robust background in managing law firm operations, financials, and information technology. Adept at driving operational excellence, optimizing financial strategies, and implementing cutting-edge IT solutions. Proven track record of enhancing firm efficiency, profitability, and technological advancement, ensuring the delivery of exceptional legal services. Committed to fostering a culture of continuous improvement and strategic innovation.

EXPERIENCE

THE EGGLESTON LAW FIRM, PC

September 2024 – February 2026

Chief Operations Officer

Key Responsibilities

- **Leadership and Strategic Planning**
 - Collaborate closely with the Owners of fully remote firm to develop the Business Plan, Budget, Marketing Plan, and Strategic Calendar, with quarterly planning for growth targets, revenue, profit, and culture.
 - Create and implement the Staff Plan, Systems Plan, and the strategic project calendar to support growth.
 - Lead and manage all non-attorney staff, conduct performance evaluations, one-on-ones, and regular team meetings to drive employee engagement and performance.
- **Human Resources Management**
 - Oversee recruitment, hiring, onboarding, and performance management for non-attorney staff, ensuring every team member has a clear job description and KPIs.
 - Supervise the HR function to maintain compliance with state and federal regulations, implement personnel policies, and manage employee benefits and payroll.
- **Financial Oversight and Business Metrics**
 - Work with the CFO on budgeting, financial forecasting, and reporting, including budget variance, P&L, and cash flow management.
 - Monitor and analyze financial metrics, implementing solutions to ensure revenue targets are met and costs are managed effectively.
 - Drive the use of key financial and operational metrics to make data-driven decisions.
- **Business Systems and Workflow Management**

PRESENTATIONS

AUSTIN CHAPTER ALA LUNCH & LEARN

TECH TOOLS TO HELP YOU MANAGE YOUR PRACTICE AND YOUR LIFE

2019 AUSTIN CHAPTER EDUCATIONAL AND BUSINESS EXPO

THE FUNDAMENTALS OF HR

2020 CHAPTER LEADERSHIP INSTITUTE:

BEYOND FOUR WALLS: SHIFTING TO OUTSIDE THE BOX THINKING FOR CHAPTERS AND BUSINESS PARTNERS

WHERE LEGAL REACHES LOCAL: CHAPTER COMMUNITY OUTREACH PROGRAMS

2020 AUSTIN BAR ASSOCIATION CLE:

THE NEW NORMAL, LEGAL TECH FOR FIRMS EFFICIENCIES AND SAFETY

2021 ALA LEADERSHIP INSTITUTE:

YOUR PRESENCE IS YOUR PRESENT

BUSINESS PARTNER PROGRAMS AND RELATIONSHIPS

2022 DENVER COLORADO MILE HIGH CONFERENCE:

A GOAL TO CENTER: A LEADERS MOMENT TO CHARGE!

2022 CHAPTER LEADERSHIP INSTITUTE:

DEIA PROGRAMS: IT'S NOT A ROLL OF THE DICE

HOW NOT TO GAMBLE WITH MENTAL HEALTH

2023 AUSITN CHAPTER ALA:

PANELIST FOR FIRM NEEDS BASED ON SIZE

2023 ALA LEADERSHIP INSTITUTE:

INTERCONNECTORS BETWEEN THE ASSOCIATION AND CHAPTERS

ONLINE COMMUNITIES: LET THE GOOD COMMUNICATION ROLL!

2023 LEGAL MANAGEMENT FUNDAMENTALS:

PANELISTS FOR OPEN MIC Q&A

2026 AUSITN CHAPTER ALA:

HOLDING SPACE WITHOUT BURNING OUT: EMPATHY SKILLS FOR DIFFICULT MOMENTS

- Develop, document, and oversee the implementation of the Firm's core systems, including case intake, billing, payments, collections, client communications, and time tracking.
- Perform regular audits of business systems to ensure policies and procedures are being followed and processes are operating as intended.
- Develop and advise on AI and automation-driven operations strategies, assessing gaps and needs to streamline processes, improve efficiency, and enable scalable growth.
- Manage technology, risk management, facilities, and vendor relationships to ensure efficiency and cost-effectiveness.
- **Marketing and Sales Coordination**
 - Ensure marketing and sales metrics are tracked and evaluated, assessing the ROI on campaigns and overseeing lead tracking and conversion rates.
 - Collaborate with the CMO and other stakeholders to ensure client acquisition and retention goals are met.
- **Executive-Level Authority**
 - Report directly to the Owners, collaborating with the CFO, and CMO, and serving as the main point of contact for business operations.
 - Manage purchasing and firm-wide commitments in line with established policies, and exercise hiring and supervisory authority over non-attorney staff.

Key Accomplishments

- Restructured the firm with existing talent and simplified systems, resulting in increased productivity with less overhead.
- Innovatively maintain an engaged collaborative culture in a remote setting.
- Worked with IT business partners to assess and secure all technology for a fully remote firm with the deployment of new firm hardware, ticketing and monitoring systems, policies, and increased cyber insurance policy compliance.
- Organized and managed software migration.
- Collaborated closely with the marketing team to strategically reposition the firm's brand presence and increase visibility across key channels. Spearheaded initiatives that enhanced outreach, resulting in stronger engagement with target audiences and improved market perception.
- Redesigned benefit package for maintaining and attracting team talent.

BURCH PORTER & JOHNSON, PLLC

October 2023 - August 2024

Chief Administrative Officer

Responsible for overseeing the law firm's smooth operation and growth, ensuring competitiveness and a client-focused approach.

Key Responsibilities

- Lead strategic initiatives and improve operational effectiveness to support the firm's goals.
- Develop and execute strategic plans, including trend analysis and expansion opportunities.
- Manage and execute projects and directives from the management committee to ensure successful and impactful outcomes.
- Oversee technology systems to ensure the firm's infrastructure's availability, security, and integrity.
- Optimize operational processes and implement best practices for enhanced efficiency and productivity.
- Manage financial goals, budgets, and performance metrics to ensure the firm's financial sustainability.
- Identify potential risks and implement mitigation strategies to strengthen the firm's cybersecurity and uphold client confidentiality.

ADDITIONAL EXPERIENCE

ROUNDTABLES:

OCTOBER 2022: CALL WITH COMMITTEE LEADERS:
WEAVING DEIA IN ALL WE DO

AUGUST 2022: CALL WITH COMMITTEE LEADERS:
PLANS OF WORK AND CROSS-COLLABORATION

DECEMBER 2020: PANEL WITH BP COMMITTEES AND
BUSINESS PARTNER RELATIONS PROJECT TEAM
ROUNDTABLE

AUGUST 2020: SHORT- AND LONG-TERM EFFECTS OF
A HYBRID WORKFORCE

ARTICLES:

JUST THE FACTS
BUSINESS PARTNER RENEWALS & CHAPTER TIPS

JUST THE FACTS
ALA 50TH ANNIVERSARY

LEGAL MANAGEMENT MAGAZINE
AUGUST 2023

**AUSTIN LAWYER MAGAZINE: FOR THE AUSTIN BAR
ASSOCIATION**
MARCH 2026
RECRUITING IN 2026: WHY PATIENCE IS YOUR MOST
VALUABLE HIRING STRATEGY

- Cultivate a positive workplace culture and lead administrative teams to focus on collaboration and engagement.

ASSOCIATION OF LEGAL ADMINISTRATORS

May 2021 – May 2024

International Board of Directors

Determine and draft strategic planning and policy-setting decisions, considering the best interests of all 8,000+ members, the Association, and the business of law.

SLACK DAVIS SANGER, LLP

2021 - 2023

Chief Operating Officer

- Responsible for overseeing the firm's administrative functions and business operations over three offices across Texas.
- Financial Planning and Controls
- Human Resources Administration
- Marketing, Systems, and Facilities Management
- Identifies and plans for the organization's changing needs; leads innovation, strategic planning, practice management, and marketing efforts across three offices.

Key Accomplishments

- Restructured staffing, compensation, and benefits to remain competitive in the evolution of the workforce.
- Established policies on systems security and internal controls to ensure the same.
- Audited software procurement, usage, and contracts to unify resources and provide training.
- Managed financing and budget for the in-progress office buildout of the Dallas office.
- Coordinated firmwide retreats to address firm culture needs with recent merger and succession planning.
- Reorganized marketing and in-progress website rebuild, and established new internal management and third-party marketing team.
- Successfully transitioned the retiring CFO of thirty years, focusing on legacy and innovation.
- Collaborated on challenging partnership agreements involving a deceased partner's ownership interest, an amicable departure of another partner, navigated financial arrangements, and protected confidential information.

GRAY BECKER, PC

2017 - 2021

Director of Finance and Administrator

Key Accomplishments

- Continuous workforce management: recruitment and management of staff onboarding, orientation, and development.
- Lead team building and morale enhancements, including rebuilding employee performance reviews and feedback structure to provide a more inclusive material and a proactive timeline.
- Coordinated public events and firm-sponsored fundraisers through local bar association law sections for associates and firms.
- Increased the number of attorneys by 75% in 24 months through restructured attorney compensation and succession planning focused

REFERENCES

DOUG BECKER

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MANAGING PARTNER, GRAY BECKER, PC

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PARTNER, GRAY BECKER, PC

JOHN JOSE

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FORMER MANAGING PARTNER, SLACK
DAVIS SANGER, LLP

SUMMER JURRELLS

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REGIONAL OFFICE ADMINISTRATOR
JACKSON WALKER, LLP

on attracting and retaining new attorneys and lateral hires.

- Championed SEO and marketing development to enhance the firm's visibility and image in the local market
- Spearheaded firm-wide technology upgrades, including migration to a cloud-based document management system, deployment of integrated billing and accounting software, and implementation of a VOIP phone system—enhancing data accessibility, operational efficiency, and mobile connectivity across all departments.
- Drove effort to achieve sustainability at every level of office operations, transitioning from 0% to 60% paperless operations.
- Establish written security policies for document retention and implement firmwide audit, purge, and ongoing procedures.

HOWRY BREEN & HERMAN, LLP

2014 - 2017

FINANCIAL DIRECTOR

Key Responsibilities

Responsible for accounting and the management of billing and collections for the firm and related entities. Oversee financial analyses to identify and respond to trends and prepare budget and financial reports. Directed Human Resources functions, including full-cycle recruiting, onboarding, training, performance management, and employee relations.

Key Accomplishments

- Restructured the firm's retirement plan to increase investment choices and employee involvement while decreasing firm administrative fees and payouts by thousands of dollars.
- Negotiated contracts with new and existing vendors to achieve software, equipment, and facilities improvements that resulted in significant savings in overhead costs.
- Established and maintained a schedule for preventive maintenance and ongoing review of new equipment and techniques to ensure savings are realized.
- Guided team-building efforts to increase retention, engagement, and cross-team support, resulting in a stronger and more flexible team.

GJERSET & LORENZ, LLP

2002 - 2014

CONTROLLER & BILLING COORDINATOR

Key Responsibilities

Directly responsible for risk management and ensuring compliance with unique contracts and highly customized client specifications in a practice that delivers specialized and exclusive programs. Performed financial analyses and delivered and implemented recommendations to support the firm's strategic goals.

Key Accomplishments

- Responded to client inquiries and supported business development that resulted in a client base increase from 40 clients to over 250 clients during my tenure.
- Designed and implemented procedures to ensure efficient and timely billing and collections in response to significant firm growth. These procedures reached all levels of firm billing activity and increased the effective billing practices of all firm members.
- Identified areas for financial reporting and developed the first set of customized reports for the firm's business operations, including intra-office performance, profit projections, and year-end support.