

Karen K. Bannister

Senior Executive & Personal Assistant | Trusted Partner to C-Suite Leaders & Founders

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PROFILE

Senior Executive and Personal Assistant with 20+ years as business and strategic partner to C-suite leaders and founders across consulting, medtech, and real estate. Expert in calendar and inbox management, complex domestic, international, and private travel, and confidential business and personal matters. Trusted with budgets of up to \$10M, P&L accountability, and executive proxy responsibilities in fast-moving, high-pressure environments. Recognized for turning fast-moving, high-pressure environments into well-coordinated operations while managing competing priorities and stakeholder relationships with exceptional discretion, polished presence, and executive maturity

SKILLS & TECHNOLOGY

Core Competencies: Executive & Personal Assistance • Executive Communications Management • Board and Investor Relations & Meeting Preparation • Stakeholder Management • Domestic & International Travel Planning & Management • Expense Reporting & Invoice Reconciliation • Strategic Planning & Initiatives Support • Event Planning & Production • Workflow Optimization & Process Improvement • Household Staff Management • AI-Enhanced Operations

Technology Platforms: Microsoft 365 (Outlook, Teams, Excel, PowerPoint, Word) • Google Workspace • Salesforce • HubSpot • ClickUp • Asana • Trello • Notion • Slack • Zoom • Concur

AI & Productivity Tools: ChatGPT • Claude • Gemini • Microsoft Copilot • Notion AI • Granola • Wispr Flow • Gamma

EXPERIENCE

Southwestern Consulting

2021 – Present

Executive & Personal Assistant

A global sales performance and leadership coaching firm with operations across the US, Europe, and South America, and a member of the Southwestern Family of Companies, one of America's oldest and most diversified private enterprises, established in 1855, with \$106M+ in combined revenue across holdings spanning executive recruiting, publishing, insurance, real estate, and professional training.

- Serve as Executive Assistant and business partner to two separate executives, the Founding Partner and the President of Training, managing calendars, inboxes, and competing priorities across multiple time zones for a globally operating coaching and consulting organization.
- Designed AI-driven Executive Briefs for client discovery meetings, lifting average close rate from 30% to 50%+.
- Reclaimed 10+ hours per week for each executive by assuming operational and administrative ownership; cut operational and personal expenditures by 20% through systematic audits and spending controls.
- Act as executive proxy, making client decisions, managing escalations, representing the executives at events, and ghostwriting their published articles.
- Prepare agendas, briefing materials, and follow-up action items for client, leadership, and stakeholder meetings.
- Plan and manage complex domestic and international travel across rapidly shifting priorities and time zones.
- Design and execute end-to-end event production, from corporate gatherings of 75 and weddings of 100+ to executive meetings and conferences
- Operations and sales lead with full P&L accountability for the executives' \$5.5M real estate portfolio of short-term rental properties and a commercial event venue, overseeing revenue optimization, vendor contracts, and booking strategy, owning the full cycle from inquiry through booking and close.
- Provide comprehensive personal and household management for the principals, including recruiting and managing household and property staff; family scheduling and coordination; financial reporting; expense and invoice reconciliation; and personal branding.

Independent Consultant

2019 – 2021

Executive Operations, Communications & Presence

Independent practice serving executives, founders, and leadership teams while pursuing independent consulting work between in-house executive roles to complete school and during COVID.

- Provided executive operations and administrative consulting to small business owners and leadership teams, streamlining workflows, communication systems, and organizational processes.
- Served clients across real estate, medtech, financial services, and professional services sectors.
- Delivered ghostwriting, editing, and content development for executives and professionals across multiple industries, spanning thought leadership, correspondence, and business communications.
- Coached and advised clients on personal branding, executive presence, and leadership visibility to strengthen stakeholder engagement and professional influence.
- Planned and coordinated events ranging from intimate corporate gatherings to global conferences.
- Managed social media strategy and content for executive and business clients, supporting brand positioning and audience development.

Masimo

2017 – 2019

Executive Assistant

A publicly traded global medical technology leader specializing in noninvasive patient monitoring, with approximately \$2B in annual revenue and operations across 50+ countries.

- Served as Executive Assistant and business partner to the Chief Medical Officer, the President of Worldwide Sales, Medical Affairs and OEM, and the VP of Business Development.
- Coordinated executive workstreams for M&A due diligence and strategic planning initiatives, managing leadership communications and executive office priorities.
- Developed executive PowerPoint presentations, briefing materials, talking points, and stakeholder communications for board interactions, investor-facing engagements, and strategic leadership meetings.
- Partnered cross-functionally with HR, operations, and executive leadership on succession planning, organizational coordination, and strategic communication efforts.
- Managed the \$2M Customer Experience Center, leading a cross-departmental team of ten to deliver high-touch product demonstrations and VIP client experiences for global delegations and strategic partners.

Career Break, Family Caregiving

2016 – 2017

Managed full-time family responsibilities while maintaining professional currency with continuous education and training.

Becton, Dickinson and Company

2006 – 2015

Manager, Administrative Support

CareFusion Corporation (acquired by BD in 2015) was a publicly traded global medical technology company with \$3.8B+ in annual revenue; following the acquisition, BD operated as a \$12B+ Fortune 500 global medical technology leader, one of the largest in the industry.

- Served as Executive Assistant and business partner to the Division President, SVP of Sales, and VP of Marketing across three business units in a complex global medtech environment.
- Directed administrative operations for a 435-person, 140,000 sq ft corporate facility, managing budgets of up to \$10M (including facility operations, capital projects, & office redesign) and overseeing vendor relationships and operational infrastructure across three divisions.
- Led, supervised, and developed a nine-member team of administrative and facilities professionals, establishing performance standards, workflow systems, and operational consistency.
- Served as certified Safety Manager, maintaining full OSHA compliance and overseeing workplace safety programs, protocols, and training across the facility.
- Spearheaded and managed a full redesign of office layout and space planning to accommodate 50 additional staff, coordinating construction, logistics, and operational continuity; completed within the 90-day requirement, within budget, and with zero operational disruption.
- Maintained executive office, facilities, and administrative team continuity through BD's acquisition of CareFusion.

EDUCATION & CERTIFICATIONS

- **BS, Business Administration**, Southern New Hampshire University (Summa Cum Laude). 2019
- **AI Proficiency Certification**, Superhuman AI Academy. 2026
- **Continuous Professional Development**. Active participant in seminars and training through ASAP, IAAP, AICI, AMA, PSRA, and industry-leading executive operations and AI productivity platforms.

ACHIEVEMENTS & PROFESSIONAL AFFILIATIONS

- American Society for Administrative Professionals, Member
- International Association of Administrative Professionals, Member; Former Branch Director
- Association of Image Consultants International, Member; Former Global VP of Business Development
- Author, "Close the Gap: 7 Transformational Steps to Move You from Today to Tomorrow," a leadership and professional development guide demonstrating executive communications expertise and thought leadership
- NSLS & Phi Theta Kappa, Member