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Experienced ERP and CRM solutions leader who transforms sales and offer management into growth engines. Expert in customer experience and lifetime value optimization across retail and corporate banking, and investment and card services. Drove strategy and execution on \$20M annual IT budget delivering on digital and real-time experience enablement. Advanced skills in sales and advice provisioning process optimization, financial analysis, portfolio management, product roadmap development, marketing automation, capital investment justification, sales team engagement, and business-driven agile development.

HIGHLIGHTED CAREER ACHIEVEMENTS

- **Pricing Change Management and Optimization** – Responsible for pricing strategy, price change implementation, and price optimization across retail and institutional business lines in over 15 initiatives including ETF and managed account products, exceeded target objectives by at least 15% and in some cases drove results 2X above target objectives
 - **Marketing Automation** – conceived, implemented and directed a centralized client experience orchestration platform that allowed for consistent and profitable delivery of acquisition, segment, preference and promotional offers for 1.2M retail and 300K institutional clients.
 - **Service Center as Profit Center** – transformed reactive HNW service center staff into proactive brokerage sales associates by developing and coordinating next-best conversation prompts using real-time analytics; proof of concept program increased net new assets vs. control by more than 220%.
 - **Multi-Channel Marketing Campaign Success** – developed and directed national B2B and B2C campaigns that achieved response rates as high as 40% through the innovative use of traditional and guerrilla marketing tactics; selected as keynote speaker for the Society for Human Resource Management
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PROFESSIONAL EXPERIENCE

SUNTEC BUSINESS SOLUTIONS, San Francisco, CA & London, UK

2012–Current

Enterprise application software firm focused on product management and business assurance in financial services and digital communication services with clients such as HSBC, ING, Schwab, Lloyds, ABSA bank, & Commerzbank

Global Head, Financial Services Industry Practice

Member of the executive leadership team, responsible for both thought leadership addressing digital transformation industry dynamics and for driving business results in sales while ensuring delivery of solutions that match client's success objectives

- Conceived, developed and delivered Financial Services Industry advisory consulting services on strategic pricing and offer management, operating model design, change management, and business process optimization
- Responsible for sales pipeline growth and acceleration from \$200M to \$350M target YOY while shifting firm's approach from tactical IT vendor to strategic solution provider; success evidenced by closing a \$10M cross-business line, cross-country sale in the APAC region that included more than \$800K in consulting services
- Developed and presented provocative thought leadership content across the globe as a speaker at events such as SIBOS, European Banking Forum, AFP, MMI, Asian Banking summit, and Retail Deposit Optimization on topics such as Big Value from Little Data, Fighting Today's Battles with Yesterday's Weapons, Gamification and Customer Centricity, and Relationship Based Pricing for Optimal Customer Lifetime Value
- Led the marketing team in designing and delivering a range of successful engagement events such as user group forums and country specific events in London, Turkey, Czech Republic, Poland and Singapore
- Structured and managed PR agency and industry analyst relationships – Celent, CEB TowerGroup, Gartner Group, Ovum – leveraging joint white papers, events, and webinars along with driving reports that favorably repositioned SunTec per our new vision

- Developed strong CXO relationships while shifting firm focus from CTO's to establishing value with CMO, CFO, and COO roles, and initiated stronger partnership ties with 4 of the leading management consulting firms.

CHARLES SCHWAB & CO., San Francisco, CA

1999-2012

Managing Director, Billing and Offer Management, 2007-2012

Gatekeeper and strategic operational leader responsible for all new product and marketing offers across all enterprises with oversight control of revenue and key billing systems for the firm. Administered portfolio of over 45 projects with total budget in excess of \$20M annually. Led team of 13 direct reports, including 2 Managing Directors with oversight of 60 onshore and offshore developers and multiple global vendors.

- Conceived and managed the central marketing platform for the firm enabling coordinated, consistent delivery of client experience across all channels – brand advertising, direct mail, email, web, mobile, social media, branch, and service call centers – and fundamental ROI metrics essential to improving.
- Identified critical enterprise need to consolidate over 42 billing systems to address business and brand risk, foregone revenue, and extreme change costs; built business case for the \$5M investment and directed vendor selection, billing system integration and implementation through to installation.
- Drove the design and delivery of enrollment and pricing for all new financial products, including Schwab ETF's, Schwab Managed Portfolios, Windhaven Managed Strategies, including over 50 promotional offers, such as the Advised Rebate program that doubled new client acquisition
- Led a comprehensive segmentation project to introduce 60+ new service models for 1.2M retail clients and streamlined over 450 legacy systems into 5

Director, Active Trader Segment Marketing, 1999-2006

Led acquisition, consolidation, and retention marketing campaigns for the active trader segment (4% of clients and 38% of revenue for the Retail business). Drove product roadmap, managed public relations, developed client engagement and retention strategies, and coordinated analyst assessments.

- Generated 18% growth in commission revenue and \$20+M annual revenue increase despite 50%+ reduction in commission prices by simplifying operations while accelerating new client acquisitions, transforming client welcome and service offers, and significantly expanding share of wallet.
- Conceived, designed, and delivered pilot to test topical in-branch active trader seminars contributing \$240+M in incremental assets and leading to 25+% increase in contribution margins from client attendees within year of participation; seminars implemented in 200+ sites nationwide with handpicked team of financial consultants trained to deliver multi-media, multi-channel client training programs
- Achieved 40% reduction in attrition for high-frequency traders by leading sales and marketing integration plan for an acquired firm; established an innovative trading platform roadmap leveraging acquired technologies and talent, and introduced state-of-the-art trading features to Schwab clients within one year of acquisition.

CONTINUITY SOLUTIONS, INC., San Francisco, CA

1997-1998

Email routing system for high-touch firms, analogous to call-routing systems in call-centers; firm acquired by E-Gain

Vice President, Marketing

Participated in founding and launch of company. Collaborated with co-founders to author business plan. Developed and implemented all aspects of marketing to drive business growth. Completed initial product management and product marketing functions, including needs analyses, product requirement definition, and beta site acquisition.

- Initiated and implemented all aspects of marketing, including establishing brand and product identities, developing PR strategies, creating B2B marketing strategies, and managing industry conference events.
- Generated over \$4M in start-up capital for firm by developing and delivering 8 capital investment presentations
- Secured 3 beta clients required to take prototype email-routing software into production.

ADDITIONAL EXPERIENCE

LEVI STRAUSS & CO., San Francisco, CA

Management Consultant for three years– designed and managed national B2B marketing campaign that resulted in 40% of Fortune 500 firms adopting casual dress in the workplace using branded training materials.

MERIDIAN SURVEYING ENGINEERING, San Francisco, CA

Management Consultant for 18 months– developed initial business plan and established processes, systems and procedures that enabled the firm to quadruple in size and penetrate all key target markets in two years.

EDUCATION AND TRAINING

Master of Science in Financial Analysis, 2010, ST. MARY'S COLLEGE, Moraga, California
Bachelor of Arts in Organizational Sociology UNIVERSITY OF CALIFORNIA DAVIS, Davis, California