

## FINANCE • STRATEGY • OPERATIONS • BUSINESS EXECUTION

For more than 20 years, I've led organizations through insightful decisions based on sharp analyses and a keen understanding of the market, industry trends, and value creation. I bring a deep understanding of organizational design, optimal investment framework, sales and participant targeting, client-facing roles and intentional change management to drive value and an exceptional experience for internal partners, clients and shareholders.

My experience is rooted in financial and data analysis, sales forecasting, business modeling, operational process and execution, and strategic investment to drive growth across the financial services, pharmaceutical, technology, and product industries.

## Experience

2017 – 2020



**COO Strategy & Business Execution- NE**  
Retirement & Retail Solutions

2012 – 2016



**Director – Strategy, & Execution**  
Relationship Management & Client Services

2007 – 2012



**Divisional CFO – IT, Sales & Marketing**  
Pharmaceutical

2002 – 2007



**Sr Financial Analyst**  
Financial Services – IT

### Initiatives

### Accomplishments

Target Operating Model (5 yrs)	\$700M Funding, \$40B Sales, 37% Margin
Organizational Redesign Retirement & Retail Solutions	Role Clarity, ~15M Savings, Increase in Client Health Stats & Experience
Sales Analytics Decile Insights	\$6B Growth Sales, \$10B Retention Sales
Participant Analytics Targeting Tool (PATT) (B2B & B2C)	\$300M Sales Increase in Mature Market (2 yr 30% Growth New/Existing Clients)
Competitive Dashboard B2B	Client Portfolio Insights & Targeting
Scorecard Redesign	Balanced Pipeline and Sales Performance
Net Promotor Score Survey	14% Increase of Customer Wallet Share

### Engagement that Matters



Authentic Leadership



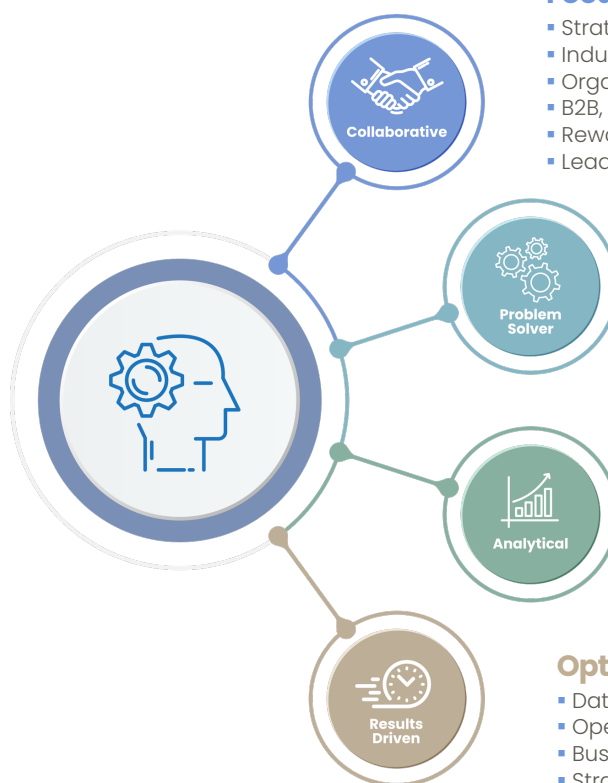
Establishing Trust



Collaboration



Deep Engagement



### Focused Leadership

- Strategy & Financial Planning
- Industry Trends & Competitive Dashboards
- Organizational Design & Development
- B2B, B2C, B2G Sales Data/Insights/Targeting/Outreach
- Rewards, Recognition and Retention Program Development
- Leadership – Coaching, Mentoring & Team Development

### Operational & Executional Excellence

- Role Clarity & Responsibility Optimization
- Ops Process Flow Assessment/Design—Six Sigma
- Database Analytics, Development & Education
- Project Management & Lifecycle Analytics
- Intentional Change Management & Execution
- UAT Testing & Guided Training

### Data Analysis and Insights

- Financial Modeling, ROI, Strategic Investments
- Cost Accounting, COGs, LTVC, Marginal Analysis
- KPI – Sales Indicators (L&L), MRR, Churn, Close %
- Product Placement & Pricing Strategy
- Sales – Compensation, Commissions & 3R Programs

### Optimized Performance Reporting

- Data Visualization & Storytelling
- Operating Cadence & BOD Review Materials
- Business and Individual Scorecards “What & How”
- Strategic Investment & Business Alignment
- Voice of the Customer (NPS) – Customer Insights