

Senior Vice President, Chief Marketing Officer

FINANCIAL SERVICES | CPG | NEW PRODUCT INNOVATION | DIGITAL MEDIA | CRM | BRANDING

Outstanding, collaborative leader with rare ability to identify, attract, and motivate highly talented people to excel at complicated tasks under severe time constraints. Work units consistently top scorers in quality, speed to market and employee engagement. Achieves results by carefully building stakeholder buy-in.

Analytical, dynamic change agent who uses compelling analytical insights to build management and peer commitment to strategic imperatives. Executes resulting plans end-to-end. Chicago MBA.

AREAS OF EXPERTISE

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|-----------------------|----------------------|-----------------------|----------------------------|
| ⇒ Business Planning | ⇒ Program Metrics | ⇒ Website Design | ⇒ Rep Education & Training |
| ⇒ Marketing Strategy | ⇒ Brand Architecture | ⇒ CRM/Lead Generation | ⇒ Conference Planning |
| ⇒ Marketing Execution | ⇒ Product Innovation | ⇒ Web content/SEO/PPC | ⇒ Staff Development |
| ⇒ Market Research | ⇒ Advertising/Direct | ⇒ Sales Literature | ⇒ Vendor Management |

CAREER HIGHLIGHTS

- Achieved 20% ROI for the last 15 years in a row by training frontline in customer satisfaction and closing techniques.
- Tripled Fidelity’s discount brokerage business – from 40 to 120K daily trades – by turning bricks and mortar business into an online trading platform. Also restored market position from low of #5 to #2 within 6 months of “live” date.
- Considered “Father of CRM” at Fidelity Investments where 38% increase in annual new assets through branding and direct response programs have since become a \$250 million revenue annuity.
- Called “best stand-up presenter on Madison Ave.” as senior account manager and new business director at BBDO. Accounts doubled in revenue every 2-3 years to \$210MM over 8 year period.
- Credited with “changing breakfast habits of a nation” by insisting that McDonald’s test breakfast biscuits with bacon.

Experience and Achievements

Senior Vice President, Marketing, 2003 to Present

Assist employer and clients in bringing disciplines of branding, database analytics and CRM to improve current marketing effectiveness and ROI. Selected highlights include:

- Launched retirement practice with 11 clients vs. benchmark of 4 for IXI Corporation, tripling anticipated revenues for client (current work - ongoing).
- Integrated direct mail campaigns have achieved 7% response and 9.7x return on investment at Webster Bank; introduced new financial planning and retirement tools & collateral for 20% sales increase.
- Shifted strategy to focus on top firms only for 30% growth, double profit at Lincoln Financial Distributors as CMO.
- Re–did collateral for single Lincoln branding; used web-centricity to cut time-to-market from 6 weeks to 6 days.

Senior Vice President, Marketing, 1996-2003

FIDELITY INVESTMENTS

Provided leadership in market-changing initiatives requiring strategic vision and implementation talent. Includes direct-to-consumer, mutual fund marketing, business-to-business, brokerage. Results: cost avoidance of \$21 million, new annual sales of \$2 billion, new annual trading revenue of \$200 million.

Retail securities trading: Major relaunch of discount brokerage from bricks and mortar to online:

Time	“Clicks”to trade	Trades per click	active trader awareness	daily trades	market share	Annual Revenues
Post	2	up to 20	33%	116 K	#2	\$ 311 MM
Pre	17	1	0	43 K	#5	\$ 117 MM

Conducted market research, hired agencies, integrated communications mix, re-designed user experience with cockpit-like UI, ran advertising with celebrities Penn & Teller, adopted endorsement brand strategy: “Power Street. Online

Trading at Fidelity.com” to give active traders “Masters of the Universe” feeling. Achieved #1 user experience rating by JD Power, #2 by Gomez.

Retail & workplace marketing campaigns: Brought CRM capability to retail contact centers, branches, web. Supervised direct staff of 70 people with budget of \$30MM. Redefined jobs of 2,100 reps to shift call center culture from service only to sales and service orientation. Became largest US Siebel installed base.

Time	Outbound Reps	Customer Satisfaction	Sales per rep (Index)	Change in annual sales
Post	270	93%	170	+ \$ 1.3 billion
Pre	53	81%	100	-

- Named “Most Valuable Player” by sales force for role in spearheading win of largest retirement and employee benefit outsourcing RFP in company history, General Motors.
- Shifted fulfillment from paper-centric to web-centric “print-on-demand” for \$21MM in cost avoidance.

Digital Marketing Pioneer, 1995-1996, 2001.

Advanced “bleeding edge” technologies to achieve customer experience break-throughs in real estate, BTB and technology categories.

- Supervised staff of 70 as Chief Marketing Officer in real estate dot.com that put home sellers on the MLS for \$500 with best-in-breed website. Homebytes.com rated #1 home-selling site by Gomez before dot.com implosion.
- President of 40-person BTB ad agency with first interactive practice in New England (DWB), called by the NY Times a “technology agency that uses technology.” Sold at an attractive multiple in 1996.

EVP, Worldwide Account Director, 1984-1995.

BBDO WORLDWIDE

Promoted to positions of progressively increasing responsibility from Account Executive to Executive Vice President at flagship ad agency of world’s #1 marketing communications company. Account assignments emphasized consumer package goods: Henkel (detergents and household cleaners, health and beauty aids), Wella (hair care), Gillette, Frito-Lay. Also have airline (Delta) and technology (Apple) experience. 6 years of my accounts:

Time	Group Billings	Countries Covered	Total Revenue	BBDO Profits	Number of Clients	Avg. # Disciplines	HQ Staff
Post	\$ 210 MM	106	\$ 27 MM	\$2.2MM	4	3.3	12
Pre	\$ 40 MM	8	\$ 4 MM	\$.9MM	1	1	5

Highlights:

- Pitched and won Wella business in 72 countries with new logo, package design, campaign built from emotion-based research techniques and umbrella brand architecture for 10% sales increase.
- Organized “Gillette. The Best A Man Can Get” re-pitch to save account when placed in review.
- Average of 128 projects in 12 countries per year – no missed deadlines. 15% margin, business doubled every 2-3 years. In detergent, household cleaner categories credited with regularly beating back aggressive P&G.
- Successfully launched Doritos, relaunched Ruffles as global brands in 9 countries, on 5 continents.
- Increased Lay’s advertising pay-out to >23% ROI and successfully recommended & launched of Salt & Vinegar.

Additional Professional Experience

Several consulting engagements in 2004, 2005, 1996. Interruption of Fidelity service to be CMO of homebytes.com in 2001. Worked as copywriter and entry-level account services trainee at top Madison Avenue agencies in early career: Leo Burnett (United, McDonald’s), McCann-Erickson (Unilever, Nabisco, A&P, Sony, NBC).

Education | Languages | Licenses

MBA, Marketing. Graduate School of Business, University of Chicago, 1982.

MA, Regional Studies-East Asia-China. Graduate School of Arts and Sciences, Harvard University, 1981.

BA, Harvard College. 1980

Fluent in English, German, French, Spanish. Working knowledge of Portuguese, Mandarin Chinese.

NASD Series 7 and 24. Married. 5 children.