
Summary

A highly accomplished, goal-focused *top sales and marketing executive and corporate officer* with extensive experience in strategic planning, business/channel development, product management/launch, branding, advertising, pricing, market assessment, and corporate communications. Drives winning strategies with an entrepreneurial spirit and proven track record of success, including the following:

- **BRAND STRATEGY:** Significant breadth of experience working with companies to clarify primary target markets, evaluate competitive advantages and opportunities, develop differentiated value propositions, and develop comprehensive brand strategies.
- **MARKETING STRATEGY:** Leveraged customer analytics and research to identify product, service, and marketing opportunities to grow market share and increase revenue.
- **CORPORATE RESTRUCTURING:** Led several reengineering and restructuring initiatives to eliminate redundancies, streamline processes and align organizational structure with corporate goals. Delivered annual cost savings over \$100,000,000 for PNC.
- **CUSTOMER EXPERIENCE MANAGEMENT:** Designed and implemented sales and service models to better deliver on key drivers of customer acquisition, cross-sell, and retention.
- **PRODUCT DEVELOPMENT AND MANAGEMENT:** Developed and launched several new consulting practices, business units, and numerous new investment and banking products.
- **BUSINESS DEVELOPMENT:** Highly successful sales person and sales manager.

A natural leader who fosters a sense of accountability. Possesses a rare ability to link strategy with tactics. Enrolls people in the vision, involving all levels and all types of thinkers into the process of goals a reality. Facilitates a positive working environment conducive to top-level performance. An engaging, compelling speaker who effectively relays critical messages. Intuitive and action-oriented, easily narrows a project to the most important elements based on quick analysis. Far exceeds targets with a tenacious desire to excel.

Experience

One Financial Services Group, Pittsburgh, Pennsylvania
Chief Marketing Officer

2002-2005

Led special project focused on enhancing revenue generated through referral channels inside and outside of bank. Identified potential referral channels, sized opportunity, developed marketing strategies, and developed product and service offers. Aligned sales management and sales force and developed sales management infrastructure. Launched marketing campaigns, created sales reporting and campaign tracking, and executed communication strategy to share learnings and results.

- **LEVERAGING REFERRAL SOURCES:** Interviewed sales managers from each line of business to understand processes used before and to see what has and has not worked. Gathered their suggestions for how results could be improved moving forward.
 - *Channel Ownership:* Named channel owner for each referral channel to oversee sales component of initiative. Identified one person in each market responsible for overseeing activities with each channel for that market.
 - *Tracking and Accountability:* Developed sales calls and sales management reporting to track activity, opportunities and results.
 - *Prospecting:* Worked with data-mining team to identify target prospects within each referral source, and generate lead lists.
 - *Marketing Tactics:* Developed marketing tactics, including direct mail, product and service offers, sales presentations, marketing collateral, and campaign tracking.
 - *Program Launch:* Launched program for each channel and managed activity.
 - *Referral Channel Growth:* Resulted in all channels significantly ahead of goal for the first time in history. Drove run rate for each referral channel to at least 50% higher than it had been last year, with momentum building.

Senior Vice President, Managing Director of Marketing

2005-2005

(CONCURRENT)

Directed marketing and product management. Led team of 30 marketing professionals to develop, retain and growth strategies for high net worth and institutional investors. Held responsibility for marketing communications, client segmentation, customer analytics, client satisfaction and commitment, research, competitive intelligence, public relations, client retention programs, new product development, and product management.

- **CUSTOMER RETENTION:** Assembled cross-functional team, including front line service providers, customer research and analytics, marketing, and training, to understand what was causing outflow and develop game plan for significantly reducing lost business. Identified why customers were leaving, which customers were leaving, and key indicators of an at-risk client. Developed several approaches for improving customer experience to retain business. Created and launched extensive training program for front-line employees uncover and address client concerns. Identified most valuable and at-risk clients, conducting in-person relationship reviews with over 10,000 relationships in nine months. Uncovered client concerns, agreed upon service standards, ensured shared expectations, and addressed any issues.
 - *Marketing Communications:* Grew sales by 30% while holding marketing expenditures flat. Drove development and delivery of integrated marketing plans, including advertising, direct marketing, collateral, investment communications, PR, seminars, and strategic philanthropy, covering 11 geographic markets.
 - *Client Segmentation:* Developed tiered service model to better align service levels with customer needs and relationship profitability.
 - *Client Satisfaction and Commitment:* Significantly boosted retention to 92%, increasing overall revenue by 11% in first year. Improved client commitment over 7% in 12 months. Delivered 150% increase in new business from client referrals.
 - *Retention:* Developed and implemented client retention program including customer analytics and at-risk predictors, training, incentive redesign, reporting, service standards, as well as product and service enhancements. Improved revenue retention by 6%. Program has been profiled in industry conferences and journals as a best-in-class retention.

E d u c a t i o n

Harvard University, Graduate School of Business Administration, Boston, Massachusetts

M.B.A., 1996

- Elected Section President first year. Elected Director of Student Affairs second year.
- Co-Chaired HBS Ventures – on campus concession programs, including yearbook, directory, printing and distribution, and HBS cleaners. Annual proceeds to benefit the student association exceeded \$400,000.

University of Virginia, McIntyre School of Commerce, Charlottesville, Virginia

B.S., Marketing and Management, 1988

- Gray Carrington Award and Scholarship – Full-year scholarship awarded annually to the University student who best demonstrates leadership, achievement, integrity, and humility.

A f f i l i a t i o n s

TARA (Today's Already Rising Achievers)

Membership Committee Member, Advisory Board Member, 2004-2005

PNC's Executive Women's Employee Resource Group

Leader of Pittsburgh ERG, 2004-2005

Harvard Business School Alumni Association — Pittsburgh

President, 2002-2003