

Visionary Marketing Operations Executive with proven success delivering well-defined marketing strategies that accelerate marketing ROI and shareholder value for global financial service providers. Respected and collaborative leader, who formulates and executes marketing strategies that harness technology to establish industry leadership and who drives best practices to guide marketing organizations toward increased automation, efficiency and savings. Recognized as a solutions champion and organizational architect, who identifies technology-driven solutions to solve critical business needs, who develops high-performing, cross-functional teams, and who delivers end-to-end marketing optimization that delivers revenue and profit growth. Noted for:

- **Strategic Business Planning:** Aligns marketing activities to corporate vision, and institutes end-to-end project management tools and process optimization framework. Linked marketing activities to well-orchestrated marketing calendar at TIAA, freeing \$17M for additional marketing services.
- **Technology Innovation:** Transforms marketing operations by dovetailing creative development with application of new technology. Developed standard language library at Scudder Investments, saving \$3.4M, and implemented enterprise content management systems at TIAA, reducing time-to-market 50%.
- **Operations Optimization:** Reengineered business processes and evaluated all cost drivers to improve bottom-line performance. Drove \$14M annualized savings at Scudder Investments and \$23M at TIAA.
- **Omnichannel Marketing:** Developed compelling online and offline messaging for B2B and B2C markets. Integrated marketing solutions across traditional print, digital media and social media in consumer-driven financial services industry, as TIAA grew from \$410B AUM to \$523B AUM.
- **Leadership Development:** Restructured and built high-performing teams. Established clear objectives, provided tools to succeed, and continually stretched team to repeatedly exceed expectations. Two of five marketing executives selected for high-potential program at TIAA came from his group.

Executive Leadership that Builds Corporate Performance

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| ▪ Strategic Business Planning Execution | ▪ Project Management |
| ▪ P&L Budget Management | ▪ Leadership Development |
| ▪ Technology Innovation Management | ▪ Omnichannel Marketing |
| ▪ Process Improvement Optimization | ▪ Enterprise Content Management Systems |
| ▪ Strategic Partnerships Alliances | ▪ In-House Agency Development |
| ▪ Marketing Operations Management | ▪ Variable Data Information Distribution |
| ▪ Outsourcing Vendor Management | ▪ Marketing Analytics |

A Career Transforming Marketing Operations to Drive Business Value

E2E Marketing Optimization, an independent marketing operations consulting company.

2012 – Present

CEO, Duxbury, Massachusetts

Designed this consulting firm to build well-vetted, integrated marketing strategies and to design end-to-end solutions that boost revenue/profit growth and drive competitiveness for Fortune 500 companies. Full authority for \$400K P&L.

- Created enterprise-wide marketing calendar and workflow process for major financial services corporation, projected to save \$20M.
 - Restructured entrenched and silo'd IT and marketing operations for third largest family of mutual funds, projected to increase profitability \$20M.
 - Identified opportunities for integration of technology enhancements and vendor management strategies for an insurance and financial service company, projected to deliver \$5.5M savings.
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TIAA-CREF, an \$889B AUM financial services provider.

2005 – 2012

VICE PRESIDENT, MARKETING SERVICES, Boston, Massachusetts

Hand selected by COO to turn around underperforming marketing operations to prevent mandated regulatory intervention and to build an operational framework to regain control of marketing budget. Led marketing services, in-house marketing agency, transactional print production, fulfillment and project management. Directed 62 employees, 18 external resources and \$52M budget.

- Developed and executed mission critical strategies to bring company into compliance on delivery of quarterly statements in three quarters, leading to 20 quarters of on-time, error-free delivery, reducing customer complaints and phone inquiries \$3M annually, and improving overall customer experience.
- Identified requirements for state-of-art intelligent data publishing system to drive mass-customization of financial communication and education campaigns targeting 3.4 million individuals. System projected to save \$6M annually, and increase productivity 30%.
- Led five Six Sigma events to boost marketing production capabilities and communication quality, generating \$12M annual savings.
- Drove transactional communications to online digital presence, increasing adoption rate from 11% to 37%, reducing postage costs and increasing customer satisfaction and experience.
- Built social media into content marketing processes for first time in Company history, maximizing media content across multiple platforms.
- Developed operational platform for Company's in-house agency that led to TIAA winning In-House Agency of the Year from IHAF for notable achievements in business impact.

Print Mail Consulting Group LLC, a boutique communications consulting firm.

2002 – 2005

PRESIDENT, Duxbury, Massachusetts

Recognized entrepreneurial opportunity and founded this management consulting firm to analyze complex marketing/communication independencies for Fortune 500 clients. Led client engagements, with \$350K P&L.

- Developed strategies to restructure and consolidate output vendors, commercial printers and fulfillment operations for a global financial services company, projected to save \$21M.
- Designed four-year plan to transition a top-tier integrated communications company's brand from a traditional printer to an information delivery company, projected to boost EBITDA 50%.
- Developed automated workflow project management process for major healthcare plan and related ad agency, increasing transparency of shared information, and resulting in 30% efficiency gains.

DWS formally Scudder Investments, a EUR \$719B AUM asset management firm. A division of Deutsche Bank.

1994 – 2002

SENIOR VICE PRESIDENT, MARKETING SERVICES, Boston, Massachusetts, 1996 – 2002

VICE PRESIDENT, OUTPUT SERVICES, 1994 – 1996

Promoted to restructure the Company's ineffective marketing operations. Led creative development, investor information delivery, transactional output services and fulfillment groups serving seven business units. Directed 60 employees and \$50M budget.

- Automated file transfer process, improving on-time mailing from 48% to 100%, and saving \$2.4M annually.
- Developed standard language library, reducing cost of prospectus/regulatory materials development \$3.4M annually, while reducing time to mail by seven days.
- Consolidated three internal agencies into one in-house agency, eliminating redundancies and increasing productivity 57%.
- Instituted print-on-demand technology, saving \$13M annually.
- Deployed first e-delivery of financial documents and proxy voting materials, delivering \$2M in first-year savings.

Education

Massachusetts College of Art, Coursework in Art | Art Education, Boston, Massachusetts
Museum of Fine Arts School, Coursework in Visual Design, Boston, Massachusetts