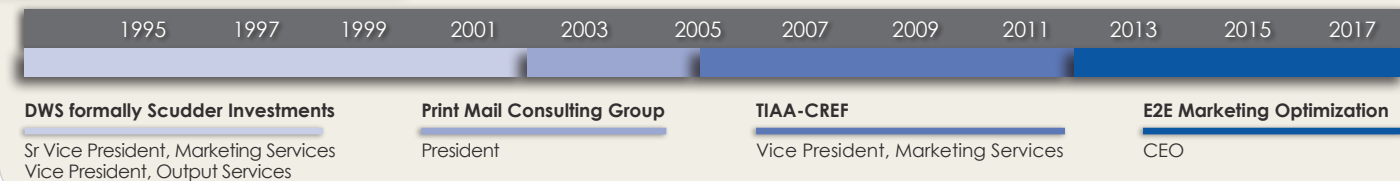


CAREER AT A GLANCE



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.

Speaking Personally...

Q How do you rapidly assess a situation and quickly move to execution?

A. I approach all situations with a strategy to identify potential opportunities and pitfalls. I start by interviewing all stakeholders to understand their points of view, and get a sense of the problem each individual is trying to solve. The questions I ask each person are the same, though the answers can differ greatly. True insights can emerge from where the issues or answers are the same – and differ. Questions I always ask: Who owns the results? Who funds the solution? What is the customer impact?

Q How has your experience shaped the way you conduct business today?

A. Over the course of my career, I've experienced and observed successes and failures within organizations and by individuals. I hope to make the road easier for team members by passing along some of this experience. The greatest learning that I try to pass along is that any problem is solvable if the guardrails are established, and the rules of engagement are identified. By facilitating setting a clear goal up front, I can ensure that all parties are on board and rowing in the same direction.

Q What is the secret to leading large scale change initiatives effectively?

A. I believe that integrity is required for leading large scale initiatives. I have earned a reputation for an honest and direct approach with my internal and external clients. I believe I add true value when I tell the organization what they need to know – not what they want to hear. I strive to clearly articulate the initiative and define the steps needed to affect the change. It is always better to have this clearly identified prior to the start of a large scale change.

Q How has emerging technology impacted you in your career?

A. As a child, the space program intrigued me. I have vivid memories of Apollo 11 launching on my birthday. I remain fascinated by the technology the space program developed, and how so many innovations from their missions made it into the public sector. Velcro is an example. It was created to serve one purpose in space, but has become a common household product with many applications. Throughout my career, I have driven innovation by applying tools that were developed for other purposes to advance marketing.

Optimizing Performance



DYNAMIC RESULTS

Aligned marketing activities to corporate vision, and instituted end-to-end project management tools and process optimization framework, freeing \$17M for additional marketing services at TIAA.

Developed standard language library at Scudder Investments, saving \$3.4M, and implemented enterprise content management systems at TIAA, reducing time-to-market 50%.

Reengineered business processes and evaluated all cost drivers to improve bottom-line performance. Drove \$14M annualized savings at Scudder Investments and \$23M at TIAA.

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.

