

Management, Marketing and Digital Executive

Digital Transformation • Growth Strategy • Customer Experience

Full-spectrum marketing executive with extensive experience in strategic growth planning, marketing innovation, digital transformation, customer analytics, and client experience. Leads strategy process from opportunity identification through product launch, customer acquisition, onboarding, and retention. Practical operational experience in a wide range of industries from financial services, retail, B2B and B2C.

Analytical and creative leader who successfully builds brands and drives growth strategies through integrated traditional and digital marketing programs, including SEM, SEO, affiliate, CRM, and social, as well as TV radio, print, and catalog. Proven track record of increasing customer satisfaction, boosting retention, and increasing lifetime customer value.

Skilled communicator who leads executive and front-line teams, external partners, and enterprise stakeholders in B2B and B2C initiatives. C-suite advisor on growth strategy, marketing resource planning, and ROI optimization. Global business experience across multiple industries. Fluent in English, Spanish, and Portuguese, and Fulbright Scholar. Non-profit board leadership experience and an advisor to two leading business schools.

NOTABLE ACHIEVEMENTS

- Grew customer base while reducing customer acquisition cost by increasing retail bank digital sales from 4% to nearly 50% of total through sales funnel optimization, new digital platforms, and expanding digitally accessible products.
- Doubled financial services marketing ROI by transitioning over 50% of marketing spend into digital media, halving the cost of each digitally acquired customer, and expanding customer base in new markets by 20%.
- Increased completed mortgage application conversion rate by 6% in 600+ FICO score segment by improving targeted communication to educate buyers about home buying process and encourage application completion.
- Reallocated retail marketing spend and optimized SEM, SEO, catalog, display, email, and affiliate channel performance to increase traffic, new customers, and profits, generating 3:1 marketing return, and improving inventory sell-through.

AREAS OF EXPERTISE

Corporate Strategy Development and Execution • Brand Strategy • Digital Strategy • P&L Management • Product Innovation • Market Segmentation, Market Intelligence • Customer Analytics • E-Commerce • Global Business • Customer Relationship Management B2B / B2C • Digital, Social, Traditional Media Strategy • Customer Experience • Market Testing

CAREER PROGRESSION

Managing Partner | June 2021 - present

Frontline Strategy Advisors | Houston, Texas

Started marketing, digital, and growth strategy consulting firm to develop and execute growth strategies across B2B and B2C industries and ensure connection of strategy to frontlines. Act as an extended member of client team to lead and execute strategies, digital transformation, marketing, employment engagement, and client experience initiatives.

- Optimized email and SMS marketing channels for a leading eyewear e-commerce retailer, to boost year-over-year revenues in these channels by 30%.
- Designed and executed hyperlocal marketing plan for national mortgage lender using digital and mass media to double origination volume by Q4, 2021.
- Implemented enhanced CRM program for affiliate channel of the above lender, with automated communications and content to double quality application starts.
- Guided a venture capital fund's brand strategy efforts to better articulate its investment criteria and improve relevancy with its target audience – entrepreneurs growing B2B SAAS businesses.

Driving growth through effective strategy, digital transformation, and innovative marketing

Sr. Client Executive | December 2021—August 2023**Curinos | Houston, Texas**

Led and nourished client relationships with large financial services organizations (over \$4T in assets) for the data, technology and advisory firm. Develop actionable growth strategies across all lines of business (retail & commercial), from deposits to lending to digital.

- Grew account revenue for ten leading financial services organizations by 30% in 2022.
- Revamped the product suite for a regional bank with estimated acquisition lift and increased deepening to contribute almost \$3.5 billion in incremental deposit growth by year 5.
- Developed an ESG strategy to accelerate the creation of a “green banking” value proposition for a national bank.
- Developed rising rate playbooks for clients to manage deposit rate betas and save millions in the rising rate environment.
- Created comprehensive digital experience assessments and strategies to guide digital transformation, grow customer base and improve the quality of digital accounts.
- Led segmentation initiatives to help clients mobilize around profitable segments, prioritize primacy customers, and organize for operational efficiency.

Chief Marketing Officer | 2020—June 2021**Envoy Mortgage | Houston, TX**

Recruited by residential mortgage company with \$5B in loan originations and 130 locations to build company brand both nationally and locally, drive digital transformation, and accelerate sales by increasing conversion rates throughout funnel.

- Launched Gift of Home marketing and PR program during Covid pandemic to provide 50 families nationwide with surprise monthly mortgage payment, with program featured on Today Show and generating 1B impressions.
- Collaborated with CEO and CFO in aligning budget with corporate strategy and setting quantifiable metrics, making business case and winning approval for \$6M increase in budget, making the case for this sizeable increase.
- Restructured CRM practices to enhance targeted messages and boost completion of loan applications, resulting in above-industry-average click-throughs and ~\$200M in incremental origination volume.
- Reversed market share decline by analyzing market data to identify priority markets, and developing strategies for pricing, digital marketing, and promotions to drive record growth in 2020 with \$5B+ in new loan originations.

Chief Marketing and Digital Sales Officer | 2015—2019**BBVA USA | Houston, TX**

Directed marketing, branding, analytics, and online account origination for leading bank. Built digital sales capability and grew digital sales. Created national brand focused on key markets. Responsible for marketing and digital sales P&L across all business lines, including retail, commercial, small business, and wealth management. 70 staff, \$41M budget.

- Expanded digital sales from 4% to almost 50% of total sales by optimizing digital sales funnel, implementing new digital marketing and sales platforms, and launching innovative digitally available loan, checking and card products.
- Tripled marketing ROI by redirecting over 50% of marketing spend into digital media, reducing cost per new account acquisition by 50%.
- Developed multimillion-dollar global rebranding project and delivered it on time and on-budget to align all regional brands under single corporate brand, while launching hyperlocal, integrated brand strategy generating 300% ROI.
- Launched integrated Super Bowl program with 10K volunteers, 21 client VIP events, free concert for City of Houston, and local Super Bowl spot with above-average ratings that doubled brand consideration score and earned 10X ROI.

Chief Marketing Officer | 2013—2014
Evite and BuySeasons | New Berlin, WI

Restructured Evite online advertising model to better align with sales operations, increasing revenue by 20%. Reprioritized BuySeasons marketing investment to optimize SEM, SEO, catalog, email, display, and affiliate performance and increase seasonal product sell-through by 15%.

Divisional Chief Marketing Officer | 2009—2013
Kmart and Sears | Hoffman Estates, Illinois

Full marketing oversight for \$2B Seasonal, Toys, Outdoor Living, and Fitness divisions, including online, e-commerce, circular, in-store, catalog, TV / radio, digital, and social. Applied data analytics to win new customers and expand cross-selling. Created digital roadmap for all divisions. Managed a \$180M budget, and managed resources across the Sears Holding Organization and with external partners.

- Created marketing analytics dashboard to measure ROI for all marketing investments and optimize spend allocation, achieving minimum 2:1 ROI.
- Transferred millions in TV advertising spend to digital marketing to triple investment ROI; developed award-winning "Grilling is Happiness" marketing program growing online sales by 10% and improving inventory sell-through.

Earlier Roles

Associate Partner, Prophet, Chicago, IL. Led teams up to 15 in multimillion-dollar brand, marketing, and customer experience initiatives in multiple industries, including rebranding and growth strategy that added \$4B to revenue for B2B manufacturing corporation.

Principal and Senior Consultant, Strategos, Chicago, IL. Directed programs delivering major revenue growth for B2B and B2C clients, including innovation pipeline management opening \$3B+ in new revenue opportunities.

Consultant, Monitor Group, Cambridge, MA. Identified growth opportunities for companies throughout the Americas, leveraging the methodologies of Harvard Professor Michael Porter.

EDUCATION

Master of Business Administration, Booth School of Business, University of Chicago, Chicago, IL
Fulbright Scholar, Graduate Studies in International Business, University of the Republic, Montevideo, Uruguay
Bachelor of International Studies and Spanish, *summa cum laude*, University of Scranton, Scranton, PA

AFFILIATIONS

Houston Chapter President, Club CMO • Board Member and Marketing Committee Leader, Center for Pursuit • Fulbright Association Board Member • Mentor at Chicago Booth School of Business Kilts Center • Advisory Board, McCombs School of Business at University of Texas at Austin • Co-Chair, Elton John AIDS Foundation, Board member and Mentor, National Jesuit Honor Society (Alpha Sigma Nu), Volunteer, Rebuilding Together and No Kid Hungry.