

PROFICIENCY PROFILE

A top-performing sales and marketing executive with 25 years of experience in banking and the private sector.

I have demonstrated expertise in accelerating partner sales, growth, and building infrastructure to develop high-performing teams. A data-driven enthusiast with the leadership and vision to make programs excel.

EMPLOYMENT HISTORY



Vice President, Client Services, Training, and Recruitment

Oct 2018 - Sep 2021

- Responsible for overseeing both Canadian and US direct sales programs while providing exceptional retail training, data capture and analytics, resulting in increasing cumulative revenue growth by 32%, cost reduction by 22%, and expansion of brand presence in each market.
- Managed a total of 26 clients with operational budgets totalling over \$65 million and a sales force of over 2,400 in-field agents and 18 direct reports. The clients consisted of telecommunication programs (Cogeco, Charter Communications), banking and financial (American Express, RBC, TD, Walmart Financial, Synchrony Financial), retail and dealer management (Auxly Cannabis, Eastlink, Kinetico and Costco roadshows).
- Researched and implemented five innovation models of employee, customer, operational and competitor innovation. Reorganized and introduced new digital and analytics tools resulted in a 32% cumulative lift in sales across programs and operating time-saving, equating to \$255 thousand in annual cost savings.
- Managed a team of 12 recruiters and oversaw annual recruitment of 2,400+ new hires for both KSG and UP Fundraising while streamlining the onboarding process and improving agent retention to 85%.
- Brought automation to the recruitment department by using an artificial intelligence platform. The AI analyzes the speech patterns, vocabulary, and tone; allowing auditors to understand what the recruiters and applicants are saying.
- Managed a team of a National Training Director and eight Training Managers across Canada and the US. Introduced *Microlearning*, a digital tool that focuses on bite-sized e-learning units that are engaging and easily each using enjoyable activities. Increased learner engagement by 98%; increased employee knowledge retention by 74%.
- Introduced and implemented the Meraki system that uses customers' cell phone signals to tracks traffic, time spent in any locations, transforming the data into valuable insights. Led to schedule optimization that reduced operational costs by 35% and maximized sales volumes by 27%.
- Established the cannabis sister company, *CanniSquad*, including branding, retail partnerships, sales processes, and training – resulting in an additional \$1 million in revenue.



Senior Director, Program Performance

May 2015 - Oct 2018

- Managed accounts totaling \$25 million for CIBC, TD, BMO, Canadian Tire Bank, Rogers Bank, US Bank, PC Financial, Loyalty One and Harley-Davidson. Increased new account and profitability growth by 45% year-over-year, while reducing operating cost by 35%.
- Designed and developed customer acquisition strategies focusing on increasing market share, brand awareness and customer satisfaction:
- Acquired 1.2 million credit card applications, representing 23% lift year-over-year.
- 14% increase in credit card approval rate and 35% lift in credit card activation / usage.
- Onboarded and managed a roster of vendors and a team of 600+ agents. Oversaw sales team training and infield performance management to deliver on client strategy at a national level. 95% decline in customer escalations and 100% compliance adherence.
- Created statements of work and ensured client contracts pertaining to service levels and quality were met.

EMPLOYMENT HISTORY (CONTINUED)



Director, Program Performance

2013 - 2015

- Developed new business relationships for accounts in Canada, Hong Kong and US; resulting in a multi-million dollar revenue stream. Ensured all countries' legal, ethical and marketing guidelines were met in each market.
- Oversaw large accounts and key relationships with new and existing clients. Simplified operations and monitored key performance indicators to exceed client acquisition targets and reduce campaign costs.
- Managed the development of new budget quotations, RFPs (request for proposal) and presentations to highlight Endo's technology, tools and services.
- Helped developed a new tool – *Digital Ear* – for monitoring infield agent performance (“call” quality) and providing real-time performance feedback and reporting. The technology and tool has since been adopted by many Canadian and US banks and staffing agencies.



Senior Manager, Alternate Channels – Credit Cards Division

2008 - 2013

- Lead the strategic design and development of Intercept channel, utilizing latest technology based acquisition, resulting in best in class non-branch sales process; increasing year-over-year total annual sales by 80%, driving 35% of total credit cards annual revenue while reducing costs by 45%.
- Managed and developed direct staff through collaborative partnerships with managers of sales forces, providing performance goal setting, evaluation, training, coaching, and professional development. Built a motivated, focused, and results oriented sales team.
- Established face-to-face annual acquisition and marketing strategies resulting in: 56 million in-field impressions, increased rate of return on investment by 115%, budget savings of 18% and external partnership revenue generation of \$350 thousand.

Channel Manager – Credit Cards Division

2007 - 2008

- Partnered with Retail Loans and Small Business group to create the Start-up for Business Program, resulting in incremental \$5.4 million in limits and 25% increase in new accounts.
- Managed and implemented four small business external direct marketing campaigns which drove \$69 million in new balances and represented a 43% year-over-year increase in new accounts.
- Assisted with online application process improvements and system implementations, producing a streamlined and integrated application for all Visa credit card products.



Business to Business Marketing Manager – MasterCard Division

2005 - 2007

- Managed the strategic and tactical development, execution, evaluation, and continuous improvement of Canadian and US intercept and branch channel, while increasing acquisition rate by 50% and profit revenue by 70% in fiscal 2006.
- Developed and executed the marketing acquisition plan, which included product positioning, target market identification, volume forecasting, budgeting, and competitive industry analysis, while increasing market share by 15% year over year.
- Relationship management: Harris Private Bank and Canadian Tire – ensuring product programs are supported and aligned with the strategic direction.

EMPLOYMENT HISTORY (CONTINUED)

BMO  Financial Group

Manager Employee Measurement and Analytics – National Office 2004 - 2005

- Developed and implemented the national annual employee sales goals by creating scenario models, defining user procedures, implementing strategies, and post-launch support.
- Supervised the in-store banking pay program while maintaining strong relationship between area managers and Hewitt Services by delivering customer satisfaction to front-line staff.
- Recommended, designed and implemented improvements to the performance reporting site; creating a central point of access for performance information, while creating 10% cost saving.

COMMUNITY SERVICE



Treasurer – Board of Directors, *Serve! Canada* 2005 - 2009

www.servecanada.org

Charitable organization focusing on at-risk youth.

- Financial director of *Barenaked in Rosedale*, Serve's signature fundraising event. The event rose over \$900,000 towards operations of Serve Canada's core programs.
- Co-lead the re-design of Serve Canada's mission, value proposition, vision, and corporate logo.
- Identified regional promotional partnership and sponsorship opportunities resulting in increased program visibility and awareness.



Vice Chair – National Board of Directors, *BMO Employee Charitable Foundation* 2004 - 2007

www.bmo.com/charity/en

BMO charitable foundation of Canadian.

- Audited financial reporting to ensure full and accurate accounting of funds (in accordance with generally accepted accounting principles), budget, receipts, disbursements, and expenditures.
- Prepared National Board's federal and provincial charitable returns and other corporate filings.
- Provided financial recommendations to the National Board and conducted investment plans to increase total funds available for disbursement.

EDUCATION

York University 2004 - 2007

Majored in economics and accounting

REFERENCES

Available upon request