

NAMRATA NARENDRA NESARIKAR

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EDUCATION

Kelley School of Business, Indiana University, Bloomington, IN May 2020
Master of Business Administration, major in Marketing and Management

- Developed a go-to-market strategy for Prophecy canned wine (a product of EJ Gallo) to increase overall brand awareness by 4% and meeting a sales volume goal of 55,000 units

Christ University, Bangalore, India May 2015
Bachelor of Business Administration (Honors), major in Marketing

EXPERIENCE

Infosys Consulting October 2020 – February 2020
Sr. Consultant

- Created the end-to-end product roadmap for resource/project management tool, utilizing Agile Methodology and DevOps methods to enhance user experience. Delivered MVP housing 1400 projects/resources
- Directed the creation of 4 benchmarking tools in Power Platform, using DevOps concepts to minimize manual work and exceeded KPIs set by product team.
- Redesigned and optimized 50+ Power BI dashboards by adopting best practices, adding enhancements requested by team and solidifying relationships with key stakeholders.
- Gathered requirements, developed 20+ process maps, and documented 80+ process flows for Palantir dashboards, created user guides and training materials for stakeholder teams to ensure mass acceptance.
- Compiled and examined use cases, conducted interviews to understand Master Data needs of stakeholders, and critical data elements for Customer Development Platform with American Food Distributer and Supplier

Kellogg Company May 2019 – August 2019
Brand Management Intern

- Managed internal cross-functional teams for Pringles and external retailers, developed a go-to-market strategy, to launch the Exclusive Flavor Program for the year 2020 with potential sales of \$19 million
- Conceptualized packaging design for the new Cheeseburger Pringles flavor by storyboarding and prototyping with agency partners, with potential sales of \$2.4 million

Target Corporation Pvt Ltd July 2015 – July 2018
Senior & Lead Item Data Specialist

- Managed active wear business within Target by supervising three team members and serving as a point of contact between team and management and launching 1,200 items onsite
- Integrated customer insights on the website by actioning on 4000 customer reviews, impacting around \$600 thousand in sales
- Streamlined processes for Men's and Kids' activewear within Target resulting in increased timeliness of item launch, 66% better utilization of team members and launch of 3,500 items
- Piloted a new end to end process project in the activewear business by beta testing and recording results and reporting implications, leading to the implementation of that new process in all teams

ADDITIONAL

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- Proficient in Azure DevOps, Jira, Agile, Microsoft Power Platform (Power BI and Power Apps)

Maxim A. Renaerts

Product & Marketing Strategist

New York City, NY • maxim.renaerts@gmail.com • 617-331-5911 • Authorized to work in the U.S. without sponsorship

Profile Summary

- Accomplished **Product & Marketing Strategist** with **+3 years record** of delivering campaign performance and scaling operational efficiency across global, cross-functional teams in **highly matrixed environments**.
- Proficient in **analytics tools**, **A/B testing platforms**, **CRM systems**, and **data modeling** techniques, with proven success in leading **AI initiatives** and **GTM** transformations that drive measurable business outcomes.
- Skilled in **product marketing** and **customer lifecycle strategy**, leveraging customer journey insights and **Voice of Customer** reports to improve conversion and satisfaction rates.
- Adept at managing discussions across **marketing**, **procurement**, and **operations**, with experience navigating regulatory, sustainability, and compliance landscapes in international markets.
- Engaged collaborator with strong interpersonal skills, able to influence and **align multiple cross-functional teams** with conflicting priorities to drive progress under aggressive time constraints.
- Able to effectively **navigate ambiguity**, **complexity** and **change** when stakes and pressure are high, and lead without authority to overcome obstacles and ensure delivery.
- International profile, fluent in **English**, **Dutch**, **French** and conversational in **German**, thriving within culturally **diverse environments**.

Technical Skills

Analytics Tools: Google Analytics, Looker, SQL, Tableau, Workfront, SPSS, Excel, Google Colab, Python, PowerPivot, Access

Experimentation Tools: A/B Testing, Dynamic Yield

CRM & Engagement Platforms: CRM, Klaviyo, Salesforce, Shopify

Customer Feedback & Research: Voice of Customer, Qualtrics, Medallia, Circana

AI & Automation Tools: Writer.ai, Microsoft CoPilot, ChatGPT, Microsoft PowerAutomate, Adobe Firefly

Work Experience

CVS Health

New York City, NY

Marketing Strategy and Operations Manager

June 2023 - Present

- Headed enterprise-wide marketing transformation by delivering **AI implementation** across **7 teams**, improving content production speed and operational efficiency by **25%** through personalized instore radio advertising using audio-generated voice, automating asset creation and PowerPoint generation, and integrating business insights with internal chatbot systems using a supplier knowledge database.
- Led **cross-functional programs**, acting as a bridge between **Marketing**, **Analytics**, **Product**, and **Compliance**, aligning these groups through structured planning, milestone tracking, and risk mitigation, resulting in the successful launch of enterprise-wide initiatives.
- Delivered **Go-To-Market** strategies and **Digital Transformation** initiatives, aligning channel strategies across **Retail**, **Pharmacy**, and **Omnichannel** campaigns with audience segmentation, lifecycle marketing frameworks, and white space analysis to increase specialty market traffic by **35%**.
- Drove alignment across **5 departments** on **3+ high-impact projects** by applying Predictive Modeling, Sensitivity Analysis, and Scenario Planning to evaluate Cross-Functional KPIs, Resource Constraints, and Timeline Risk, accelerating delivery and unblocking execution.
- Analyzed ROI of marketing initiatives using Multi-Touch Attribution Modeling, Media Mix Modeling, and Incremental Lift Testing, delivering actionable recommendations to improve campaign performance by **5%**.

- Directed **market research** and segmentation initiatives utilizing internal Customer Loyalty data and internal research, applying **Psychographic Persona Modeling** to identify underpenetrated customer cohorts, thereby increasing customer acquisition.
- Conducted in-depth **competitive and white space analysis**, developing guidelines for news jacking to stay within brand compliance and supporting projects focused on pharmacy recruitment initiatives to make roles more attractive.
- Optimized marketing investment decisions by building forecasting models with **Excel**, incorporating multi-year ROI trends, and increasing budget efficiency by **2%** across priority markets.
- Delivered compelling **presentations** to senior leadership by translating complex marketing performance data and segmentation insights into clear, actionable narratives, directly influencing investment decisions and securing buy-in.
- Championed a culture of innovation and inclusion by organizing department-wide events such as **Pride+** programming, **Hack Week**, and **Shark Tank**, while integrating team feedback into workflows to foster engagement, creativity, and continuous learning.
- Coordinated effectively across **multiple regions**, including **Hawaii** and **Hispanic Market**, by navigating cultural nuances, aligning stakeholder priorities, and adapting digital media strategies to local market needs, ensuring a seamless transition and successful Martech implementation.

Lenskart

New York City, NY

Product Marketer Intern

May 2022 - September 2022

- Evaluated customer journey touchpoints and **GTM** alignment to shape the **CRM** campaign strategy for **U.S. market entry**, using customer persona development, path-to-purchase mapping, and messaging consistency audits to position the brand for omnichannel growth.
- Increased conversion rates by **7%** by developing a personalized **CRM** strategy across **SMS, email, and WhatsApp**, enabled through **Klaviyo**, and informed by behavioral triggers, lifecycle stage, and cart abandonment events.
- Shifted **CRM** efforts from reactive to proactive by creating and operationalizing a Voice of Customer framework using thematic analysis of NPS feedback, real-time sentiment tracking, and CSAT surveys, achieving a **9%** uplift in customer satisfaction scores.
- Improved online campaign performance by **14%** by leading experimentation with In-House **Dashboards** and **Dynamic Yield**, and applying A/B and multivariate testing to optimize **CRM** and product messaging.
- Strengthened **U.S. market** positioning by conducting competitive analysis through consumer review mining and Talkwalker, and applying a positioning matrix, feature benchmarking, and pricing landscape mapping to inform product differentiation and campaign messaging.
- Shaped **U.S. market-entry plans** by synthesizing U.S. eyewear retail trends and customer persona research, and developing a market prioritization matrix, localization of value propositions, and driving an increase in engagement during first-phase acquisition campaigns.
- Coordinated Customer Relationship Management, Creative, and **Go-To-Market** efforts across cross-functional teams to launch products, boosting first-week adoption rates

Deloitte

Brussels, Belgium

Senior Consultant - Risk Advisory

October 2020 - August 2021

- Advised **Deloitte's internal IT team** on operational risk, procurement strategy, and compliance implementation across this multinational organization in regulated industries.
- Reduced procurement training time by **60%** by designing scalable, data-driven IT sourcing processes and creating training frameworks with **SAP Ariba**, accelerating onboarding and ensuring policy consistency across business units.
- Implemented Sourcing Software across **5+** stakeholder groups with tailored workflows and digital approvals, reducing procurement escalations by **35%**.
- Evaluated operational risks and provided guidance on Deloitte-Aligned Control Frameworks to improve enterprise risk mitigation, led the development of a proprietary Supplier Risk Checklist, and initiated a sustainability audit workstream with a **5-member** team.

Inditex

Brussels, Belgium

Supply Chain & Sustainability Strategy Associate

October 2015 - September 2020

- Led sustainability program execution and procurement strategy across **97** stores in **3** international markets, aligning operations with Inditex's global **CSR** goals and compliance standards.
- Launched the **Inditex Take-Back Program** across **60+** stores in **Belgium** and **Luxembourg**, improving sustainability KPIs by building partnerships with charities, logistics providers, and waste compliance agencies and integrating reverse logistics workflows, employee education campaigns, and store-level KPI tracking.
- **Reduced in-store maintenance costs** by **3%** by optimizing scheduling based on vendor ratecards, cleaning timetables, and vendor **SLA** data, and implementing centralized scheduling systems.
- Decreased third-party vendors spend by **13%** annually by designing and executing a vendor risk management audit across facility, security and cleaning services, waste management suppliers, and logistics vendors, applying risk scoring models and performance audits to inform renegotiation and consolidation strategies.

Public Relations and Communications Assistant

May 2015 - September 2015

- Supported marketing and communications efforts across media relations, customer support, and **PR** campaigns, utilizing media impression modeling and **CRM** systems to increase brand visibility by **11%** and reduce media reporting time by **75%**.

Leadership & Misc. Activities

New York City Center

New York City, NY

Steering committee member

January 2024 - Present

Court of Master Sommeliers

New York City, NY

Introductory Sommelier

September 2024

- Completed an intensive Master Sommelier Course at the Institute of Culinary Education, passing the sommelier exam at the Court of Master Sommeliers.

Solvay Brussels School Of Economics And Management

Brussels, Belgium

Marketing Department Lecturer

February 2015 - June. 2018

- Lectured and coached undergraduate business and economics students on marketing trends, digital strategy, and tools, achieving a **100%** student pass rate across **12** classes.

Boston University Questrom School of Business

Boston, MA

President of Questrom's MBA Marketing Club

April 2021 - May 2023

VP of Alumni Relations for CohortQ (LGBTQ+) Club

October 2021 - May 2022

Teaching Assistant

October 2022 - May 2023

Education

Boston University Questrom School of Business

Boston, MA

Master of Business Administration in Social Impact

August 2021 - May 2023

Master of Science in Digital Technology

August 2021 - May 2023

Solvay Brussels School of Economics and Management

Brussels, Belgium

Advanced Master in Marketing

September 2014 - July 2015

Hasselt University

Hasselt, Belgium

Master of Science in Business Economics

September 2013- June 2014

Bachelor of Science in Business Economics

September 2010- June 2013

ALEXANDER GEORGAKIS

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PROFESSIONAL SUMMARY

Strategic content and operations specialist with over 15 years of experience managing complex projects in entertainment, education, and emerging tech. Proven ability to manage cross-functional initiatives, streamline workflows, and translate audience insights into data-informed business outcomes. Demonstrated success aligning content operations with organizational goals, producing high-impact deliverables for global audiences, and collaborating with senior stakeholders across corporate, legal, and creative functions. Adept at driving clarity from ambiguity, optimizing processes, and managing execution across multiple teams, timelines, and priorities.

KEY EXPERTISE

- | | | |
|-----------------------------------|--|----------------------------------|
| • Strategic Content Operations | • Campaign Planning & Execution | • Cross-Functional Communication |
| • Project & Program Management | • Content Performance Analysis | • Market Research & Insights |
| • Workflow & Process Optimization | • Airtable, CMS, & Collaboration Tools | • Business Writing & Messaging |
| • Creative Strategy & Development | • Stakeholder Alignment & Engagement | • Media & Entertainment Strategy |

EDUCATION

UCLA ANDERSON SCHOOL OF MANAGEMENT

Los Angeles, CA
2024

M.B.A., Fully Employed Program

- *Honors:* Harold M. Williams Award (top 2% of graduating class); Entrepreneurship Excellence Capstone Award; Outstanding Student in Decisions, Operations & Technology Management; GPA: 4.00

UNIVERSITY OF SOUTHERN CALIFORNIA

Los Angeles, CA
2006

B.A., Cinema-Television with Honors, Summa Cum Laude

- *Honors:* University Trustees Award (highest scholarship average of graduating class), Cinema Circulus Scholar

EXPERIENCE

ADVIZE

Los Angeles, CA
2025-present

Content Consultant

- Led the development and execution of a data-informed content strategy to support Advize's growth objectives, resulting in a 313% increase in social media engagement and a 227% increase in member reach over two quarters
- Produced and managed a portfolio of 40+ articles and digital assets aligned with market trends, user behavior insights, and educational needs of college and graduate student audiences, optimizing content lifecycle and resource allocation
- Synthesized qualitative research from student and industry expert interviews into scalable digital deliverables, transforming complex workforce data into actionable thought leadership and user-centric content
- Leveraged analytics tools to monitor campaign performance, track KPIs (e.g., engagement rate, CTR, and reach), and generate strategic insights that directly informed content iteration, audience segmentation, and go-to-market positioning

URSA MINOR (UCLA MBA THESIS PROJECT)

Los Angeles, CA
2023-2024

Co-Founder/Director of Communications (UCLA MBA Student Role)

- Partnered with co-founders to develop a comprehensive 50-page business plan, 100-page industry analysis, and 20-minute investor pitch, targeting executive stakeholders in the government procurement and contracting sector for a proposed B2B technology startup
- Planned and managed detailed project roadmaps and timelines, coordinating cross-functional workflows, budget constraints, and delivery of key milestones spanning market research, strategic analysis, and investor engagement
- Led end-to-end market research efforts, conducting 130+ primary research interviews with prospective customers and industry stakeholders across procurement supply chain, informing product design, pricing strategy, go-to-market roadmap, and channel partnerships
- Built a financial model to evaluate business development opportunities and guide long-term growth strategy, incorporating revenue projections, cost structures, and sensitivity analyses to support investor discussions and operational planning
- Awarded UCLA's Entrepreneurship Excellence Capstone Award, recognizing the most outstanding MBA thesis of the graduating class for innovation, strategic insight, and execution

UCLA ANDERSON SCHOOL OF MANAGEMENT
Research & Course Assistant, Entertainment Globalization

Los Angeles, CA
2024

- Conducted qualitative and quantitative data analysis on global film industry trends across historical and contemporary data sets to support the development of a pioneering MBA course on global entertainment, directly contributing to course design, faculty presentations, and instructional content
- Collaborated with cross-functional stakeholders, including senior executives from CAA, Blumhouse, and Legendary Entertainment, to scope and deliver strategic research addressing high-priority business challenges in content distribution, localization, and international growth
- Led full-cycle project management for multiple research workstreams—defining objectives, setting timelines, coordinating deliverables, and managing stakeholder engagement to ensure on-time, high-quality outcomes aligned with academic and executive expectations
- Synthesized complex findings into actionable insights, developing executive-ready presentation decks that supported strategic discussions at the intersection of entertainment, globalization, and business innovation

FREEFORM • FX ON HULU • LEGENDARY • LIONSGATE • WARNER BROS. TV • ABC FAMILY
Script Coordinator

Los Angeles, CA
2009-2023

- Series: *Good Trouble* (20 episodes), *Class of '09* (8 episodes), *Lost in Space* (8 episodes), *Step Up: High Water* (20 episodes), *The Vampire Diaries* (16 episodes), *Switched at Birth* (71 episodes), *Make It or Break It* (38 episodes)
- Directed cross-functional project workflows across 180+ scripted television episodes, managing version control, document integrity, and timely distribution of mission-critical deliverables in compliance with industry and internal standards
- Served as primary project liaison between creative teams, production units, legal, business affairs, and network executives, ensuring aligned execution of creative and operational goals under tight timelines and regulatory constraints
- Managed multi-phase production schedules, including tracking deliverables, milestone planning, and coordinating approvals across internal and external stakeholders, ensuring on-time delivery of materials across concurrent productions
- Oversaw contract and compliance workflows, collaborating with legal and business affairs to facilitate union-compliant documentation (e.g., deal memos, credit notices, and compensation agreements) and mitigating legal/financial risk
- Implemented process improvements to streamline documentation flow, reduce turnaround times, and minimize errors in high-volume, fast-paced operational environments

ABC FAMILY (THE WALT DISNEY COMPANY)
Writer, Switched at Birth

Los Angeles, CA
2012-2015

- Led full-cycle development and execution of two nationally broadcast television episodes, managing cross-functional collaboration between writers, producers, directors, and network executives to align creative direction with production timelines, budgetary constraints, and long-term brand strategy
- Facilitated 2-hour cross-departmental production planning meetings, translating narrative and creative objectives into executable production plans, and acting as on-site decision-maker for real-time issue resolution during filming
- Generated \$40K in cost savings by rapidly restructuring scenes during high-cost night shoots, balancing production efficiency with creative integrity under compressed timelines
- Produced branded content for multi-platform marketing campaigns, scripting supplementary materials (e.g., web and social media videos) to drive fan engagement, reinforce narrative continuity, and align with digital marketing objectives

THOMAS KITCHEN

Dallas, TX • (314) 387-0603 • thomas.a.kitchen@gmail.com • [Portfolio](#)

EDUCATION

Southern Methodist University, Cox School of Business
Master of Business Administration, Minor in Strategy

Dallas, TX
May 2025

Dillard University
Bachelor of Arts, Theatre Technology

New Orleans, LA
May 2015

EXPERIENCE

Senior Accounts Payable Specialist
Oscar Health

(Remote) Dallas, TX
Sept 2024 – June 2025

- Spearheaded cross-functional deployment of Workday and SAP Concur, boosting AP efficiency by 80%.
- Developed and trained finance teams on scalable SOPs, achieving 100% GAAP compliance, improving audit readiness.
- Managed resolution of GL discrepancies, increasing on-time vendor payments by 75% and reducing payment errors.
- Partnered with leadership on reporting initiatives, delivering strategic insights that enhanced financial accuracy.
- People manager for 2 offshore employees along with training executive assistants and senior management in Workday.

Accounts Payable Analyst
The Row

(Remote) New York, NY & Dallas, TX
Feb 2021 – Sept 2024

- Processed 1,500+ monthly invoices and developed detailed SOPs, ensuring 100% compliance with GAAP and VAT.
- Managed \$3M+ in annual AP transactions while coordinating with warehouses to verify stock and shipment compliance across 3+ American & international locations along with 3-way match resolving GL & departments.
- Facilitated month-end close by preparing accurate AP accruals and performing reconciliations, reducing errors by 25% and supporting audit readiness; trained and managed two employees with tasks delegation at month end.

Consultant, Financial & Business Strategist Projects
Private Clients

(Remote) New York, NY & Dallas, TX
Sept 2022 – Jan 2024

- Engineered and built complex financial models to evaluate investment opportunities business strategies.
- Utilized Power BI, Python, SQL, and Excel to gather, analyze, and interpret financial data.
- Develop and implement comprehensive strategic initiatives to drive business growth, enhance operational efficiency, and achieve long-term organizational objectives.

Accounts Payable Analyst (Freelance)
Ralph Lauren, Ralph's Coffee

New York, NY
May 2019 – April 2020

- Administered 1,000+ monthly invoices across 3+ locations during Ralph's Coffee expansion, ensure 98% on-time payments.
- Led AP coordination for \$500K Tokyo Airstream café launch, managing vendor accounts and cross-border payment.
- Implemented SAP Ariba across Ralph's Coffee department and improved invoice accuracy by 30% and reduced onboarding time by 40% by streamlining payment workflows for vendors; trained and led new employee.
- Managed and trained a new team member while serving as the primary point of contact for all SAP Ariba-related processes.

Accounts Payable Analyst (Freelance)
Proenza Schouler

New York, NY
Oct 2019 – April 2020

- Implemented SAP Concur, cutting AP processing time by 40% and automating invoice and expense workflows.
 - Facilitated invoice processing for 1,500+ invoices in RLM, resolving data issues and boosting system accuracy by 30%, 3-way matching and variance analysis on \$2.5M+.
 - Configured SAP Concur workflows and reporting, increasing spend visibility and accrual tracking by 20%.
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ADDITIONAL INFORMATION

- **Technical Skills:** GAAP, VAT, SQL, AI, Python, Excel, Tableau, SAP ERP, Confluence, Jira, Workday, SAP Concur, S4HANA, Power BI, HTML, QuickBooks, Data Analysis, Financial Reporting, Microsoft 360/Office, Cloud-based Tools, Machine Learning.
 - **Certifications:** Stanford Machine Learning Specialization; Oracle AI Vector Search, Data Science & Architect (in progress)
 - **Core Skills:** Financial Analysis, Sales and Business Analysis, General Ledger, Data Visualization, Strategic Planning, Process Optimization, Cross-Functional Collaboration, Financial Modeling, Vendor Management, and Leadership.
 - **Academic Projects:** Led Dallas Immersion Project (2023), Won "War Games" Competitive Intelligence (2024)
 - **Community Involvement:** Cox Graduate Finance Association, Consulting & Corporate Strategy Club; President & Vice President, Black Ivy Couture; Counselor, College Students for Youth;
 - **Past Work**
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Justin Pilozo

Personal Info

Phone
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E-mail
jwpilozo@gmail.com

LinkedIn
www.linkedin.com/in/justinpilozo

Software

Microsoft Excel	<div><div></div></div> Advanced
Microsoft Word	<div><div></div></div> Advanced
Microsoft PowerPoint	<div><div></div></div> Advanced
Data Visualization	<div><div></div></div> Proficient

Skills

Microsoft Office Suite	<div><div></div></div> Expert
Mathematics	<div><div></div></div> Advanced
Adaptability	<div><div></div></div> Advanced
Problem Solving	<div><div></div></div> Advanced
Financial Accounting & Reporting	<div><div></div></div> Proficient
Financial Statement Preparation	<div><div></div></div> Proficient
Probability & Statistics	<div><div></div></div> Proficient

Languages

French: Intermediate (speaking, reading); rudimentary (writing)

Spanish: Elementary (speaking, reading, writing)

Work History

New York University , Provost Fiscal Affairs, New York, NY <i>Senior Financial Analyst</i> (Apr. 2025 – Present)	Oct. 2022 – Present
<ul style="list-style-type: none">Build and maintain driver-based financial models to support scenario planning, long-term strategic forecasting (3–10 years), and business unit P&L analysis, allowing leadership to evaluate the financial impact of operational decisionsDevelop zero-based budgeting templates to improve transparency and identify cost-saving opportunities across operating expendituresLead monthly and quarterly forecast reviews, conducting variance analysis and delivering root-cause explanations to support ongoing performance management and resource allocation	
<i>Financial Analyst I</i> (Oct. 2022 – Mar. 2025)	
<ul style="list-style-type: none">Designed and implemented a dynamic long-range financial model for the Provost Division's 10-year strategic plan, integrating unit-level inputs and aggregating them at the division level, improving forecast accuracy and enabling multi-scenario analysis to support strategic planning and annual budgeting cyclesDeveloped a dynamic budget model that allowed units to compare actuals to budget forecasts, increasing transparency, reducing manual reporting, and supporting more informed financial decision-making.Managed NYU Provost Division's endowed funds, overseeing spending policy compliance, fund utilization, and financial reporting to ensure alignment with donor intent and institutional prioritiesMonitored performance against budget and provided variance analysis with actionable recommendationsAssisted with journal entries, budget adjustments, and fund transfers to ensure accurate financial records in compliance with internal policies	
New York University , Department of Accounting & Ross Institute of Accounting Research, New York, NY <i>Administrative Aide</i>	Sept. 2019 – Oct. 2022
<ul style="list-style-type: none">Develop and review annual budgets and prepare monthly financial statements of financial performance by collaborating with the budget department to provide the director with information needed to operate and expand research and partnershipsSuccessfully developed and implemented a new website and design for the Ross Institute of Accounting Research, along with the first Department of Accounting newsletterCreated complex Excel-based assignments with accounting knowledge to challenge students' comprehension of Financial Accounting and ReportingEffectively trained faculty and staff to utilize NYU Brightspace and create remote exams during COVID-19	
Department of Buildings , Human Resources, New York, NY <i>College Aide/Recruitment Assistant</i>	Feb. 2018 – Aug. 2019
<ul style="list-style-type: none">Collected, cleaned, and analyzed workforce data from the HRIS system, delivering insights to support headcount planning, attrition analysis, and strategic HR decision-makingImproved various recruitment databases for accuracy by implementing strategies for key performance indicators to highlight accurate insights, gaining 80% recruitment workforce accuracyEffectively facilitated and established candidate assigned placement by acting as the immediate contact for candidates, managers, and other city agencies	
New York University , Human Resources, New York, NY <i>Office Assistant</i>	Feb. 2017 – May 2019
<ul style="list-style-type: none">Engaged, supported, and provided onboarding assistance and information to candidates from different countries and diverse backgrounds in a busy environmentUpdated and maintained candidate's status and employment information on iCIMSCreated and updated presentations, documents, and new hire paperwork	
Arista Air Conditioning , Finance and Administration, Long Island City, NY <i>Intern</i>	June 2017 – Aug. 2017
<ul style="list-style-type: none">Analyzed and presented financial and operational performance reports to managers regarding company operation and growth opportunities leading to a 25% increase in company savingsExamined company's and customer's spending on other air conditioning manufacturers to determine the most profitable competitorMaintained and updated databases of customers purchase, billings, and billing schedules, aligning costs with revenues	

Education

New York University , New York, NY Leonard N. Stern School of Business Master of Business Administration	Feb. 2023 – May 2025
School of Professional Studies Continuing Education/Non-Credit Record in Accounting	Jan. 2020 – Dec. 2020
Courant Institute of Mathematical Sciences Bachelor of Arts in Mathematics	Jan. 2017 – May 2019

ALEXEI NIKONOVICH-KAHN

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EXPERIENCE

CHEP

Atlanta, GA

Senior Manager, Strategic Operations

May 2024-July 2025

- Chaired automation improvement committee, increasing automated repair throughput by 70% across 14 service centers
- Consolidated contract enforcement functions across 6 business units, identifying \$1.5M in previously uncaptured savings
- Introduced vendor scorecards and customer outcome-based incentive and penalty programs into all 3PL contracts

DELTA AIR LINES

Atlanta, GA

General Manager, Global Distribution & Service Delivery

April 2022-January 2024

- Revitalized technology platforms to decrease order and delivery issue resolution time by 300% for over 400 kitchen and laundry delivery locations across 6 continents
- Chaired Delta's "Digital Twin" supply chain modeling team to evaluate Delta's global supply chain strategy company wide
- Implemented task automation and leader standard work to eliminate 1,100 minutes of non-value added work daily
- Executed 4 3PL RFP initiatives to reduce annual cost by \$1.6M and institute performance incentives globally
- Led a global business unit of 27 people including managers, analysts, and coordinators across 5 teams on 3 continents

Warehousing & Analytics Manager, Onboard Service (OBS)

July 2021-April 2022

- Overhauled Delta's global warehouse strategy for 1,500 food and service SKUs across 5 3PL's and 9 nodes
- Devised monthly KPI reporting for every aspect of material logistics operations from inventory planning to order delivery
- Instituted performance scorecards for all 3PL warehousing providers across Delta's OBS supply chain operations

Analytics Manager, Operations Analytics

September 2019-July 2021

- Developed multi-airline competitive benchmarking standards to improve regional airline reliability by 2.3%
- Partnered cross divisionally to propose and implement fleet specific COVID-19 seating arrangements using passenger survey data to increase available seat miles by 5.7% and allow travel companions to sit together
- Restructured and consolidated the goal setting process for global TechOps operations, encompassing 82,000 distinct goals

WILLIAMS-SONOMA INC.

Memphis, TN

Assistant General Manager, Supply Chain Solutions

January 2018-September 2019

- Optimized and maintained all sourcing and routing rules for 22M online orders across 8 brands and 54 distribution sites
- Analyzed order trends across 12M annual orders to revise DC operations schedules and final mile sortation times to shorten average speed to customer by 13%, or 1 day for 82% of customers annually
- Led WSI's international supply chain design and 3PL RFI process for: Australia, Canada, and China expansion programs
- Oversaw a 460,000-sq. ft. personalization and distribution center shipping 6M cartons annually

Senior Operations Manager

August 2017-January 2018

- Enhanced small parcel network design and distribution center layouts to increase carton consolidation and bring network wide cartons per order from 1.18 to 1.09 for a freight savings of \$1.1M annually
- Designed and implemented a proactive SKU slotting procedure to shrink SKU count by 33% across 6 brands and optimize picking and packing efficiency, saving over \$2.5M annually in labor and shipping costs

Operations Manager

July 2015-August 2017

- Managed a team of 590 direct reports across 20 different distribution center functions

EDUCATION

GEORGIA INSTITUTE OF TECHNOLOGY, Scheller College of Business

Atlanta, GA

Master of Business Administration (MBA)

December 2023

Bachelor of Science, Business Administration

May 2015

ADDITIONAL INFORMATION

Skills: Tableau, QlikView, Alteryx, SQL, SAP, SAS, PkMS, Python, Supply Chain Guru, Microsoft Office Suite

Certifications: Six Sigma Green Belt, Tableau Analyst, Microsoft Excel for Data Analytics, Forklift Operator

Publication: E-commerce Flow Management in Fulfillment Centers Through Data Visualization. HCI (23) 2018: 767-778

Community: GT Intown Atlanta Alumni Network – VP of Finance & Scholarship, Voices of Note – Singer

David Crawford

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<https://www.linkedin.com/in/crawforddavid311>

Growth | Market Development | Health

Dynamic growth leader with a passion for building and scaling consumer-centric health care brands. Proven record in building differentiated GTM strategies that drive revenue growth and expand market share. Brings ~15 years of experience in strategic planning, digital sales and transformation, and consumer product management.

Core Skills

- GTM strategy and planning
- Market research and analytics
- P&L management and budgeting
- Brand strategy and measurement
- Product strategy and sales
- Marketing and sales operations
- Performance management
- Team leadership

Experience

CVS Health, New York, NY

June 2020 - present

Executive Director, Corporate Strategy & Business Development

(Progressive experience, including promotion from Lead Director in April 2022)

- **GTM strategy and planning for Consumer Growth function:** Defined multi-year strategic plan with Chief Customer Officer, and secured 60% capex growth; outlined priority initiatives, leading to market share gains and mid-single digit revenue growth.
- **Enterprise digital health strategy development:** Architected the three-year digital health strategy, business case, and operating roadmap across payor, pharmacy, and provider lines of business at height of Covid-19 pandemic, resulting in launch of an integrated CVS Health super app and acquisition of +25M new digital customers.
- **Digital and consumer growth operations:** Assessed and implemented operational changes with corporate functions to achieve revenue growth targets, including digital product and experience roadmap, promotions and pricing changes, and distribution channel partnerships (e.g., Google and MinuteClinic)
- **Financial performance management and budgeting:** Working with Finance, aligned Consumer Growth strategic plans to investment portfolio, supported monthly business and budget reviews, reviewed marketing and campaign performance, and built executive financial reports.
- **New business development:** Evaluated and launched tech-enabled multi-million EBIT businesses (e.g., CVS Media Exchange) across provider, payer, and pharmacy segments, including idea incubation, market assessments, business case development, financial planning, product-market fit, and operational planning.
- **Post-acquisition integration:** Supported integration activities and deal economics for Oak Street Health acquisition, working with retail pharmacy, patient advocacy, legal and marketing teams to define growth strategies and operational plans.

- **Market research leadership:** Founded and led a six-member research function, delivering monthly analysis, competitive intelligence, financial models, forecasts, and trend reports for the CEO, senior management, and the Board of Directors.

Accenture, New York, NY, and Washington, D.C. **Jan. 2013 – June 2020**

Manager, Consulting Practice, Digital / AI advisory services

(Progressive experience, including Analyst, Senior Analyst, Consultant)

- **Global digital transformation leadership:** Managed case teams on over twenty projects for multinational corporations and government entities, focusing on digital transformation, product monetization, and cost-take out. Clients included organizations in health care, life sciences, insurance, retail, and financial services.
- **Product strategy and implementation:** Led commercial SaaS / AI-enabled product strategy and development with clients, including user research, experience design, prototyping, software engineering, and testing. Oversaw global digital engineering functions, successfully managing across time zones and delivery centers.
- **Account management:** Account executive on national client accounts, with consistent annual sales of +\$5M (>\$25M direct sales over tenure); experience across pre-sales and sales channels, CRM, contracting and negotiation.
- **Pricing and contract development:** Led and supported account management teams in responding to new RFPs, proposals, and client needs; priced professional services solutions with Finance teams; extensive use of sales tools like Salesforce.
- **Offering development:** Developed new consulting offerings and thought leadership (e.g., AI services); represented at conferences and relevant events to deepen client relationships and network with potential partners.

Other relevant responsibilities

- **Team leadership and culture of innovation:** Demonstrated success in leading and developing global, high performing teams of ~10 for over a decade.
- **Commitment to employee engagement:** Over two years, led a national employee resource group with 4.5K national members in all fifty states, achieving +20% YoY member growth and improved workforce representation, HR benefits, and engagement. Managed 5+ external partnerships. Secured national awards.

Education | Certification

Executive Certificate in Finance | Harvard Business School, 2021

Executive Certificate in Business Strategy | INSEAD, 2019

The University of Manchester, United Kingdom
MA in International Development, December 2012

University of North Carolina at Chapel Hill and National University of Singapore
Joint BA in Geography, May 2011, *focus on economics and urban policy.*

Executive Profile

Senior leader with 15+ years of expertise in commercial real estate analytics, capital markets research, and economic analysis. Proven track record of translating complex data into actionable insights for C-suite executives and winning multi-million dollar business opportunities. Recognized thought leader with extensive media and public speaking experience.

Professional Experience

Jones Lang LaSalle (JLL) - New York, NY

Director of Research, New York Tri-State Area (October 2022 - Present)

- **Strategic Leadership:** Direct 11-person team of analysts and data scientists covering the world's largest commercial real estate market
- **Business Development:** Generated \$15M in new business revenue in 2024 through data-driven insights and client engagement
- **Executive Communication:** Regularly present market intelligence to C-suite leaders and senior real estate executives
- **Thought Leadership:** Established as subject matter expert through media appearances, speaking engagements, and published insights across real estate trends, labor markets, demographics, and capital markets

American Immigration Council / New American Economy - New York, NY

Director of Research (January 2018 - October 2022)

Associate Director of Research (September 2014 - January 2018)

- **Team Development:** Built and led multidisciplinary team of economists, demographers, and data scientists
- **Strategic Planning:** Established organizational research agenda in consultation with department heads and Executive Director
- **Data Innovation:** Produced 300+ research publications, including award-winning data tools recognized by Fast Company
- **Stakeholder Engagement:** Built relationships with media, business leaders, and government officials
- **Academic Contribution:** Co-authored book chapter on economic integration for academic publication (2024)

Additional Experience

- **Susan Jackson Associates** - London, UK: Researcher (2013-2014)
- **City of New York, Office of the Mayor:** Policy and Strategic Planning Intern (2013)
- **Council on Foreign Relations** - New York, NY: Program Associate, Studies (2009-2012)

Education

- **London School of Economics** - MSc *with first honours* in Regional and Urban Planning, 2014
- **Sciences Po Paris** - MA *avec mention bien* in Urban Policy, 2013
- **Boston College** - BA *with honors* in International Relations, French

Technical Expertise

- Statistical Analysis: Stata, SPSS, R
- Geospatial Analysis: GIS, Tableau
- Data Visualization & Presentation
- Budget Management (\$250,000+)

Additional Qualifications

- **Languages:** English (native), French (native fluency), Spanish (working knowledge)
- **Media Training:** Television and print media experience
- **Selected Speaking Engagements:** Wells Fargo REIT Securities Investor Conference (2024, 2025), NY Build (2024), Columbia Business School "Future of New York Real Estate" (2023)

Dean Driver, MBA, MSM

(646) 496-5861 | mrdeandriver@gmail.com | [linkedin.com/in/deandriver](https://www.linkedin.com/in/deandriver)

SUMMARY

Senior marketing and business development leader with national and international experience managing multi-million-dollar PNL. Proven track record of creative, measurable, and goal-oriented accomplishments. Known for being a leader who is a curious and flexible independent thinker with strong communication skills, having proven expertise in leveling up quality products and revenue, and an adroit ability for team management and building global and community partnerships. Extensive experience in wholesale and retail sales and marketing operations. A keen interest in leading strategy, digital applications, and analysis roles, and mastery in customer resolution techniques and crisis management.

Languages: Fluent in English and conversational in French

Press: Featured articles in *Elle Décor*, *Traditional Home*, *The New York Times*, *The Knot*, *The Chicago Tribune*, *The Dallas Morning News*, *Numerous television appearances*, and *speaking engagements at major retailers nationwide, including Saks 5th Ave and Bergdorf Goodman*.

HIGHLIGHTS

- Managed key accounts for major retailers, including Neiman Marcus, Bergdorf Goodman, Marshall Fields, and Barney's NY.
- Facilitated new product development and launches, brand awareness, experiential marketing events, and sales initiatives for luxury brands, including BMW, Hermes, Lalique, Rosenthal, Seguso Viro, and Versace
- Championed marketing and sales teams to produce seven-figure increases in profitability.

EXPERIENCE

Lululemon, New York, NY

November 2023 – Present

Educator – Global Flagship Store

Allen Dean Home, Pine Brook, NJ

June 2012 – July 2023

Founder and President

- Led end-to-end business operations and strategy of e-commerce business with 65 luxury home décor brands sold to more than 10,000 clients
- Orchestrated strategies to provide an outstanding digital customer experience and increase sales, resulting in a 35% increase in profits in less than a year
- Developed marketing materials and campaigns to foster brand equity, including website development and digital marketing ads, resulting in a 40% increase in customer engagement

Consilium Creative Marketing, Dallas, TX

June 2007 – June 2012

Founder and President

- Established a consultation with a major museum gift shop, which transformed the outlet into a global luxury boutique and resulted in an 85% increase in revenue
- Produced, designed, and executed 15 new product events for eight companies that amplified brand strength and integrity, some of which resulted in direct sales.
- Advised two luxury retailers on product purchasing and merchandising to boost the sales volume by 26%

Omega Watches/ Swatch Group USA Weehawken, NJ

December 2005 – June 2007

Regional Sales Director- Midwest

- Oversaw sales and marketing to luxury retailers in 17 states and increased both sell-in and sell-through by double-digit percentages, increasing revenue by 20% over the previous year to 40 million dollars.
- Established stock and sales plans for key accounts and executed company-designed sales and marketing strategies that secured the opening of 15 new accounts per year
- Developed and measured brand standards at 50 branches of national retail branches, adding to the overall profit of the territory

Rosenthal USA, New York, NY

February 2005- December 2005

Regional Sales Director - Midwest

- Directed sales and marketing activities for all independent accounts in 18 states as well as facilitated the sales of the national accounts, Neiman Marcus, and Marshall Field's, strengthening both company relationships and sales volume substantially
- Facilitated the transition of Marshall Field's systems from Target to the May Company, audited inventory levels, and reconciled consignment merchandise, which decreased lost revenue by 20%
- Spearheaded and planned nationwide Versace events for multiple Neiman Marcus stores that resulted in sales that outperformed forecasts by 30%

Seguso Viro USA, New York, NY

May 2003 – February 2005

V.P. of Sales and Retail Marketing – US, Canada, Mexico, and the Caribbean

- Headed wholesale distribution for more than 200 retailers and formulated strategies for new business opportunities and long-term growth by developing 1,3, and 5-year plans and budgets, which strengthened brand awareness and motivated a 25% increase in sales volume
- Identified inventories and analyzed profit margins to reduce costs from the previous 2-year period
- Corresponded daily with the Italian team to facilitate product development for branded and private-label merchandise.

Hermes of Paris, New York, NY

June 2004 – February 2005

Independent Regional Sales Manager

- Provided training, sales support, and event coordination for three tabletop brands: La Table Hermes, Puiforcat, and Cristal Saint Louis
- Collaborated with buyers and store owners to create exciting assortments and presentations

Lalique North America

April 2001 – December 2002

Manager of Merchandising, Training, and Special Events

- Interfaced with company representatives in France to conceptualize, develop, and execute marketing events and new product launches for four brands: Haviland and Parlon, Jean Louis Coquet, Philippe Deshoulieres, and Puiforcat
- Coordinated with visual merchandising directors at major retailers to ensure brand presence and placement that increased sell-through in all brands by 30%

Dean Driver Events, New York, NY

March 1997 – April 2001

President/ Owner

- Conceptualized, designed, and implemented marketing events for 20+ clients, including BMW, Designer's Saturday, MIT, The New York Design Center, and Warner Bros.
- Designed the New York Design Center's table for the prestigious DIFFA Benefit, Dining by Design.

EDUCATION**William & Mary, Raymond A. Mason School of Business (Williamsburg, VA)**

May 2025

Master of Business Administration (MBA)

William & Mary, Raymond A. Mason School of Business (Williamsburg, VA)

December 2022

Master of Science, Marketing (MSM)

Southern New Hampshire University (Manchester, NH)

Bachelor of Arts, General Studies with a concentration in Social Media Marketing

June 2025

Parsons School of Design (New York, NY)

Studied Interior Design

New York University (New York, NY)

Studied General Studies

Mary Washington College (Fredericksburg, VA)**Technical Skills:** Microsoft Office (Advanced Excel), Tableau, QuickBooks, Sage, Alteryx, Canva, Prezi, and Shopify

Michelle Rukeyser

865-804-3542 | michelle.e.rukeyser@gmail.com | [Michelle Rukeyser](#) | [LinkedIn](#)

Strategic finance leader with global experience in FP&A, budgeting, and executive reporting, managing budgets over \$250M and leading cross-functional teams to deliver insights that drive senior decision-making. I am skilled in forecasting, KPI tracking, and financial modeling, with a strong focus on aligning performance with strategic goals and ensuring compliance.

Professional Experience

BASF MBA Leadership Development Program

Rotation 4: Business Controlling Chemetall (Boksburg, South Africa)

May 2025 - Present

- Partnered with Sales and Procurement teams to strategically analyze product costing and CM1, focusing on import/export activities to inform pricing decisions and improve margin performance.
- Led financial planning and analysis efforts, including P&L, EBIT, and cost monitoring, while driving digitalization and CapEx initiatives to align financial operations with long-term business objectives.
- Evaluated Service Level Agreements and cost-sharing frameworks to ensure strategic alignment with organizational goals, supporting EC's carve-out and positioning the business for a potential sale.
- Developed and onboarded a new Controlling team member, fostering capability growth and ensuring seamless integration into financial operations through structured training and mentorship.

Rotation 3: Verbund Site Controlling and Special Projects (Freeport, TX)

Aug 2024– Apr 2025

- Provided strategic financial leadership for Freeport and Geismar sites, ensuring accurate month-end close and aligning site-level controllership with broader business objectives.
- Led a cross-functional team in designing a Power BI dashboard for fixed cost and budget tracking, enhancing financial transparency and enabling real-time decision-making.
- Conducted economic and utility analyses to evaluate project viability and resource efficiency, presenting data-driven recommendations to senior leadership to guide investment decisions.
- Directed the invoicing process for a \$75M Department of Energy grant, successfully completing the initial submission and establishing a scalable, audit-ready framework for future compliance.

Rotation 2: CCR BU & Seneca Site Controlling (Iselin, NJ & Seneca, SC)

Feb 2024 – Aug 2024

- Led a strategic ROCE analysis for the CCR business unit, developing a tracking tool and presenting key performance insights to senior leadership to guide capital allocation and improve return on investment.
- Oversaw month-end close activities for the Seneca site and CCR BU, ensuring accuracy, timeliness, and alignment with broader financial reporting objectives.
- Managed site-level controlling responsibilities, including onboarding and mentoring a new team member to strengthen team capability and ensure operational continuity.
- Provided agile financial support for ad hoc requests from CCR leadership and site operations, delivering timely insights to support tactical and strategic decision-making.

Rotation 1: North American Regional and Verbund Controlling (Florham Park, NJ)

Jun 2023 – Feb 2024

- Directed the North American Regional Budget (~\$250M), proactively managing financial assumptions and communicating strategic updates to key stakeholders to ensure alignment with business objectives.
- Provided executive-level reporting to the Global Support Unit Planning Team, delivering monthly cost performance insights that supported informed decision-making and long-term planning.
- Led targeted cost deep dives into areas such as productivity and travel, identifying optimization opportunities and presenting actionable recommendations to enhance financial efficiency across the region.

Eastman Chemical Company MBA Business Finance Kingsport, TN

May 2022 – Nov 2022

- Designed and implemented a Forecast Accuracy tool to strategically assess fixed manufacturing costs across multiple plants, isolating volume and rate variances to refine forecasting for key product lines.
- Built a robust data model to enhance fixed cost predictions across 15 batch-manufactured product lines, incorporating inventory dynamics and intra-plant material transfers to improve planning precision.
- Resolved a \$0.75M cost overrun at a Brazilian plant by identifying accounting discrepancies in packaging costs and leading a cross-functional team of accountants and plant staff to implement corrective actions.
- Led cross-functional collaboration with engineering and product development to create a production cost model for a new product line, contributing to \$3M in annual EBIT and supporting strategic initiatives.

First Horizon Bank, *Bilingual Virtual Banker*, Knoxville, TN

Apr 2021 – Sept 2021

- Led customer verification efforts for English and Spanish-speaking retail clients, ensuring secure account access and building trust through accurate identity validation.
- Independently managed high-volume customer interactions (800–1,000/month), resolving complex account changes, fraud claims, and transaction disputes while identifying strategic opportunities for customer retention and product upselling.
- Identified and engaged top-quartile customers, initiating targeted sales conversations and leading efforts to promote account upgrades and additional retail services, contributing to revenue growth and customer satisfaction.

Propel Insurance, *Account Assistant*, Knoxville, TN

Aug 2019 – Apr 2021

- Led risk trend analysis across multiple business lines, auditing deductible payments and assessing customer risk profiles using five-year payment run rates to inform underwriting and client engagement strategies.
- Oversaw CRM data integrity for sales (Sagitta) and relationship management (Image Right), ensuring accurate, actionable insights to support cross-functional decision-making.
- Resolved complex client concerns with speed and professionalism, including policy changes and new coverage initiation, strengthening customer trust and contributing to retention and growth.

Human Connections, *Microfinance Team Lead*, Bucerias, Mexico

Jun 2018 – Aug 2018

- Led cross-cultural engagement initiatives by partnering with Mexican microentrepreneurs to develop virtual marketing materials and immersive cultural exchange tours. Designed and implemented a scheduling and onboarding system for a 30-participant volunteer program, enhancing operational efficiency and program scalability.

EDUCATION

University of Tennessee, Haslam College of Business

Master of Business Administration

Ohio Wesleyan University

Bachelor of Art, Political Science

Universidad de Salamanca, *Spanish*

Knoxville, TN

December 2022

Delaware, OH

May 2019

(Semester Abroad Fall 2017 Salamanca, Spain)

SKILLS

Financial Analysis, Cost Management, Project Management, Consulting, Mentoring and Coaching, Power BI, Budgeting, Cost Center Planning and Management, Compliance, Data Analytics, Digitalization, Cost Reporting, Communication, SAP, Analysis Office, Enterprise Data Lakes, COINS, COBUS, MARIS, OCEAN, SAP S/4HANA, Product Costing, Spanish

SLOAN PATTON, MBA

linkedin.com/in/sloanpatton

EXPERIENCE

2024 - 2025

ERNST & YOUNG

Senior Business Transformation Consultant (Healthcare)

Chicago, IL | Nashville, TN

- Performed comprehensive market research and competitive analyses in healthcare services, identifying growth opportunities and operational benchmarks to support strategic positioning and equity value creation.
- Analyzed operational capacity, resource utilization, and value creation across multi-site healthcare system, identifying projected ~\$1 million in annual cost savings and increasing patient throughput by 10%.
- Served as a pharmacy strategy subject matter expert supporting a platform migration for a managed care organization; enabled CMS compliance and achieved \$3-4 million in projected cost savings through utilization and workflow optimization.
- Facilitated an executive-level training session focused on the rise in healthcare cost inflation, translating operational levers (labor productivity, revenue cycle automation, supply chain) into cost reduction strategies.

2023 - 2024

SHORE CAPITAL PARTNERS

Private Equity Strategy Analyst Intern

Nashville, TN

- Created data-driven business plans incorporating market positioning and growth strategies for a healthcare consulting portfolio company, resulting in increased operational efficiency.
- Authored two industry research reports analyzing 500+ private equity deals in the healthcare and food & beverage sectors, identifying three key acquisition targets.

2024

VENTUROUS

Investment Research Analyst Intern

Nashville, TN

- Sourced and presented a 48-company pipeline to Longrun Capital across three meetings; 90% were net-new, 35% (17 / 48) advanced to take a meeting, resulting in three top-priority meetings.
- Validated willingness to pay of \$15 - \$25 per qualified opportunity, confirming unit economics and informing pricing for the sourcing workflow.

2023 - 2024

HCA HEALTHCARE

Marketing Operations Intern

Nashville, TN

- Performed advanced data analyses on executive survey results, performing cluster, segmentation, and frequency analyses across 15 vice presidents' responses.
- Built executive data visualizations that revealed three key scalability opportunities, resulting in enhanced strategic initiative understanding and consolidation of ~\$3 million of segmented expenses.

2019 - 2022

BLUECROSS BLUESHIELD OF TENNESSEE

Outreach Pharmacy Specialist | Healthcare Operations

Chattanooga, TN | Nashville, TN

- Drove digital platform optimization, implementing strategic brand messaging and workflow improvements that increased customer response rates by 20%, reduced operational error rates by 50% in two years, and enhanced data management across disease, social determinants of health, and claims data warehouses.
- Recognized as a top-performing team member with leadership awards in a 1,000+ employee division.

2018 - 2022

SLOAN PATTON PRODUCTIONS, LLC

Owner | Project Manager

Chattanooga, TN | Nashville, TN

- Originated and managed institutional / public-sector accounts (regional payer, municipal governments, and an economic development agency), resulting in 20% growth in revenue and project throughput over four years.
- Expanded the client portfolio from 1 to 10 through targeted outreach and relationship management, increasing bookings / ARR and diversifying revenue concentration.

EDUCATION

VANDERBILT UNIVERSITY

OWEN GRADUATE SCHOOL OF MANAGEMENT

Master of Business Administration, 2024; Concentration: Strategy

Nashville, TN

- *Leadership:* Nonprofit Board Finance Committee | Owen Out & Allied | Vanderbilt Business Healthcare Association | Owen Finance Club

THE UNIVERSITY OF TENNESSEE AT CHATTANOOGA

Bachelor of Science, Political Science

Chattanooga, TN

ADDITIONAL

- *Core Competencies:* Investment Thesis Development, Market Mapping, Commercial and Operational Due Diligence, Financial Modeling and Valuation, Unit Economics, Cohort and Sensitivity Analysis, KPI Design and Portfolio Reporting, Go-to-Market and Pricing, Post-Close Value Creation
- *Healthcare Focus Areas:* Provider Enablement, Value-Based Care, Payer-Provider Alignment, Pharmacy and Medication Management, Health System Operations, Healthcare IT/Data.
- *Tools:* Excel (advanced financial modeling), PowerPoint (advanced pitch decks), Financial Research Tools (Bloomberg, Capital IQ, PitchBook), Tableau, SQL (working proficiency)
- *Affiliations:* Nashville Health Care Council, Healthcare Financial Management Association, Project Management Institute
- *Personal Interests:* Concerts, Travel

DANISH IQBAL

(847) 769-4596 • IqbalDanishM@gmail.com • www.linkedin.com/in/IqbalDanish

WORK EXPERIENCE

Nextdoor - Sr. Data Scientist, Core Product & Experimentation

2024 - Present

Hyperlocal social platform for neighborhood communities

- Drove product strategy on feed content distance in response to user feedback that content was not “hyperlocal” enough; identified geographic and topic-level patterns, resulting in testing ongoing tests that increase or decrease region radius by topic type.
- Created a CausalImpact-based anomaly detection tool adopted by cross-functional teams to flag metric drops; improved issue detection speed from five days to one, and reduced false alarms by 30%.

Angi - Sr. Data Scientist, Testing and Measurement

2022 - 2024

Previously Angi’s List – technology platform connecting home service contractors with customers

- Created and led a task force to improve and evangelize A/B testing best practices, introducing calculators, checklists, guidelines, and trainings to align teams on robust experimentation methods
- Introduced critical testing concepts such as smoke testing, metric selection, holdout groups, data literacy. Led a bi-weekly test review with leadership to evaluate experiment and drive product strategy.
- Designed two market tests which affect 30% of all Angi revenue leading product improvement based on insights (e.g. lead quality and distribution timing improvements)
- Developed internal market testing tool, (CausalImpact model) to extrapolate market test impact more effectively. Incorporated market selection and A/A testing to improve data accuracy and decision making

Wayfair - Analytics Manager, Search and Recommendations

2019 - 2021

Technology company building a 3PL warehousing and drop ship network for furniture

- Created test plan and model that led to a 1% increase in margin by boosting Wayfair-exclusive-suppliers performance – resulting in insights into pricing and product placement
- Demonstrated 20% conversion lift by analyzing behavioral patterns of customers from recommendations, showing retention and earlier purchasing behavior (ie butterfly effect)
- Optimized warehousing processes by analyzing funnel performance, reducing misallocated inventory and late orders by 25%.

DoorDash – Data Scientist and Product Manager

2017 - 2019

Technology company building a last mile logistics and delivery network

- Conducted A/B testing for self-support workflow for ‘Can’t find my food’ orders. This resulted in a 20% reduction in support cases, while maintaining customer retention, satisfaction and fraud at pre-test levels
- Reduced 60+ mins late deliveries by 0.5% by analyzing and modeling delivery bottlenecks such as time taken to assign a driver. Experimented with driver pay incentives to reduce lengthy accept times
- Created merchant performance triggers via clustering algorithm, thus improving triaging abilities by 50%

Sears Holdings Corporation – Business Analyst Program

2010 - 2014

Fortune 71 – parent to Sears and Kmart. 9th largest online retailer with \$40B annual revenue in 2013.

Hired as of 20 in rotational leadership pipeline program recruiting from top undergraduate colleges

Analytics Manager, Kmart.com

- Drove \$12M ‘Pick up from Store’ project, allowing customers to pick up items ordered online in stores. Formulated inventory, data indexing, and browse flows with engineers for business needs.
- Led team of analysts in creating an automated dashboard that combined 17 data sources of sales, margin, product, site performance, and customer data. Awarded quarterly award for innovation.

EDUCATION

University of California, Berkeley: Master of Science, Information and Data Science; GPA: 3.73

2015 - 2017

Courses include: Machine Learning, Field Experiments and Causality, Data Visualization, Statistics

Dartmouth College: BA in Economics, Honors; GPA: 3.4

2005 - 2009

Economics Thesis: Oil, Gas, and Political Competition in India

PROGRAMMING AND DATA LANGUAGES

- SQL, Tableau, Looker, JavaScript (jQuery), CSS, PHP, R, Python (pandas, numpy, scikitlearn)

EXPERIENCE

BASF, MBA Leadership Development Program

Specialist Customer Experience, Agricultural Solutions

Feb 2025- Present

4th Assignment, *Limbergerhof Germany*

- Consolidating customer journeys across Europe, defining common pain points, and recommending targeted B2B solutions.
- Delivered 3% Sales increase in the United Kingdom through campaign-aligned customer experience improvement projects.
- Created a scalable global customer experience visualization and customer experience toolkit.

Global Launch Manager, Pharma Solutions,

Aug 2024 – Feb 2025

3rd Assignment, *Tarrytown, NY*

- Led go-to-market strategy for \$11M NPV product launch, engaging cross-functional teams across North America and Europe.
- Built 14 website pages to enhance the pharma solutions website with a focus on SEO with key stakeholder alignment.
- Developed a global technical trend tracker with 25 key trends influencing Pharma Solutions 10-year strategic business plan.

Global Strategic Marketing Manager, Dispersions, Resins & Additives,

Jan 2024- July 2024

2nd Assignment, *Charlotte, NC*

- Quantified global impact of complexity reduction and portfolio pruning equating to \$3 M savings.
- Designed an ABM strategy for inkjet market expansion; delivered 12 customer sample requests via highly targeted campaigns.
- Created a value chain influencer marketing global plan, obtained 2 NDAs, and implemented the 2024 North American plan.

Marketing and Strategy Manager, Care Chemicals,

June 2023 – Dec 2023

1st Assignment, *Florham Park, NJ*

- Managed launch of 2 new enzymes to NA market, including marketing collateral development, training, and project management. Saved business \$10 M with global strategic realignment.
- Developed the “Competitive Offset” tool in Power BI mapping 3,000 competitor SKUs against 200 BASF products.
- Conducted comprehensive market & competitive analysis as basis for strategic business plan for 10-year SBU strategy.

Dell Technologies

Remote

Graduate Supply Chain Intern

Summer 2022

- Strategically improved enterprise global parts availability by 2% and created a new global minimum inventory strategy.
- Built live roadmap tracking all merger projects, eta, and actions which led to further optimization and redundancy fixes.

Penn State Smeal College of Business

State College, PA

Schreyer Research Scholar

Aug 2021- May 2023

- Coordinated Marketing Symposium with CSIS on Central Bank, Cryptocurrency, and Stable Coin.
- Managing an international team of 6 to write a book on Central Bank Digital Currencies for publication.

Verif-y

Philadelphia, PA

Analyst, Systems Operations and Marketing

Aug 2020 – Aug 2021

- Increased AI 80% and decreased manual labor hours per unit by 1.5 hours.
- Built analytics using data from 2,000 users to showcase beta testing and reported weekly to C-Suite managers.
- Increased ticket response time by 200% working with 4 major clients to implement omni-channel customer support model.

Peace Corps Panama

CNB, Panama

Community Business Advisor

May 2019- Mar 2020

- Trained farmers on income-generating agribusiness best practices such as business management, strategic planning, marketing, post-harvest methods, and value-added products.
- Co-managed women’s artisan group built out supply chain for artisan goods and increased profitability by 100%.

Education

Penn State Smeal College of Business

State College, PA

Master of Business Administration, Marketing, Supply Chain Management & Sustainability

May 2023

The College of New Jersey

Ewing Township, NJ

Bachelor of Science in Marketing, International Business Minor

May 2019

Tools: Salesforce, HubSpot, Power BI, Excel, PowerPoint, Canva, Adobe InDesign, LinkedIn Ads, Zendesk, Jira

B2B Strategy Expertise: Demand Generation, Account-Based Marketing (ABM), Campaign Execution, CX Mapping, Segmentation, Field/Event Marketing

Languages: Spanish (fluent), German (A1), Ngäbere (basic)

Accomplished and people-focused professional with international success in driving organization’s reputation and success through expertise in global mobility, employee relations, talent acquisition, and program/project management.

Excel at translating business priorities into fit-for-purpose human resources strategies, plans, and actions. Stellar record of developing and implementing global human resources initiatives as well as employing current human capital practices to attract, develop, and retain top talent. History of driving organizational excellence in areas of HR strategy definition and implementation, performance evaluation, talent management, positive employee relations, employee engagement, workforce planning, and HR functional excellence. Adept at establishing and nurturing collaborative relationships with employees, management, and executives using exceptional relationship-building and communication skills.

Areas of Expertise

- People Operations
 - Business & HR Strategy
 - Business Process Improvement
 - Employee & Media Relations
 - Expatriate Management
- Global Human Resources Management
 - Global & Niche Talent Acquisition
 - Organizational Development
 - Strategic Human Resource Planning
 - Internal/Intercultural Communications
- Relationship Management
 - Global Cross-functional Team Leadership
 - Government & Public Relations
 - Contract Negotiation
 - Team Building & Leadership

Career Experience

Senior Specialist, Thunderbird Global School of Management, Phoenix, Arizona

October 2023– Current

- Partner with Employer Relations team to attract and maintain relationships with Fortune 500 companies and foreign embassies, resulting in 25% increase in international recruitment opportunities
- Lead cross-cultural career coaching for diverse student body representing 30+ countries at Thunderbird School of Global Management, ranked #1 globally for International Trade
- Coordinate with foreign chambers of commerce and trade organizations to organize international career fairs and industry conferences, expanding Thunderbird's global employer network by 40%
- Develop targeted employer branding strategies positioning Thunderbird as premier source for global talent, leading to new recruitment partnerships with Microsoft, PepsiCo, Visa, and Tata Sons
- Design and implement customized career advancement plans for international student cohort achieving 97% satisfaction rating and 92% global placement rate

Manager, Human Resources, UIS, Phoenix, Arizona

November 2020– September 2023

Oversaw 500+ employees in dynamic Taiwanese-headquartered start-up, involving end-to-end HR functions oversight and crosscultural conflict resolution. Serve as key POC for employee relations support, thought partnerships, and coaching for employees and management. Mobilize and lead leadership teams in all people matters, including staffing plans, employee retention and communications, performance management, and talent development. Manage day-to-day immigration and assignment management processes, while advising staff on HR policies and procedures. Conduct terminations and exit interviews, while communicating emerging trends with executive leadership.

...continued...

- Partnered with business leaders to devise HR strategies to attract and retain talents for optimal business performance.

- Onboarded **100+** expatriate assignees and oversaw entire process, including visa applications, relocation, and payroll set-up.
- Evaluated and resolved more than **20** sensitive employee relations cases
- Empowered and directed foreign-led executive team unfamiliar with U.S. laws and best practices.
- Recruited **30+** new hires in wide range of niche roles in highly competitive employment market.
- Designed structured onboarding program for new hires to improve employee productivity and efficiency.
- Formulated exceptional talent acquisition strategies for niche, specialized, and sophisticated roles.

HR Manager, CCTV/CGTN, Beijing, China

March 2013 - March 2020

Selected to identify and hire global talent supporting editorial, production, and social media, which involved branding entire company as employer of choice in competitive market. Designed survey for new hires to measure their performance. Drove candidate hiring process, including reference checks, salary recommendations, and hiring decisions. Devised plan to strategically map staffing cycle and allocate human and marketing resources in high growth periods. Provided personalized coaching to managers and executives on overall effectiveness, internal communications, and employee relations.

- Saved company **\$100K** in recruiting expenses within the first 120 days by crafting and executing staffing strategy.
- Boosted percentage of hired referrals from **7%** to **30%** through strategic program leadership.
- Realized **100%** contract retention rate among expatriate hires.
- Developed and spearheaded employee orientation and onboarding programs by collaborating with various disciplines and departments to drive considerable improvements.
- Recruited and onboarded more than **150** expatriate staff to China independently.
- Sustained turnover rate to less than **10%** and realized over **80%** of hires renew contracts.
- Navigated complex cross-cultural challenges in ambiguous environment.

Assistant HR Manager, The Walt Disney Company, Beijing, China

March 2010 - February 2013

Created and executed best-fit onboarding and employee relations strategy for high-growth start-ups in China. Acted as main point of contact in overcoming challenging employee relations matters with managers and legal to mitigate risks. Coached Regional Vice President and District Managers on various operational and HR initiatives. Examined and took appropriate action against violations.

- Onboarded more than **600** expatriate employees to cities across China.
- Represented North Region HR team with regional, national, and global executives to deliver presentations on key metrics and provide recommendations.
- Drove consensus-building and process optimization in alliance with between US and China teams.

Additional Experience

Client Relationship Consultant, Pearson plc (Beijing, China)
Senior Associate, Córdova Public Relations (Albuquerque, N.M.)
Communications Director, U.S. Congress (Washington, D.C.)

Education & Certifications

Bachelor of Arts in History | University of Massachusetts, Lowell

EDUCATION

- University of California, Irvine, The Paul Merage School of Business, Irvine, CA** **June 2024**
Master of Business Administration, Marketing
- President of the Marketing Association and Business Technology Club.
 - MBA World Summit 2023: Awarded among the top 100 MBAs worldwide.
 - Fellowship and Scholarships: Reaching Out MBA (ROMBA LGBTQ+) Fellow 2024. MBA Prospanica Member.
- ESAN Graduate School of Business, Lima, PERU** **December 2020**
Specialized Certificates: Consumer Experience Management & Digital and Analytics Marketing
- San Pablo Catholic University, Arequipa, PERU** **December 2019**
Bachelor of Business Administration, Marketing

EXPERIENCE

- SAP, Newport Beach, CA** **July 2024 – Present**
Product Marketing Manager, Finance and Spend Management
- Drove global go-to-market (GTM) initiatives by designing and executing a scalable customer reference program aligned with SAP Ariba's product strategy, resulting in 20+ high-impact customer assets while ensuring brand, and legal compliance.
 - Conducted competitive and market assessments across North America, LATAM, and EMEA to support strategic positioning of SAP Spend solutions, collaborating with product, sales, and customer teams to guide decision-making and value articulation.
 - Partnered with UX, brand, and creative teams to deliver localized, campaign-ready content that supported product readiness and global sales enablement.
- MATTEL INC, El Segundo, CA** **June 2023 – September 2023**
Brand Strategy & Retail Marketing Analyst- Disney Pixar Action Figures
- Drove launch strategy for a collector-focused Toy Story product line, coordinating across design, operations, and sales to ensure sell-in success resulting in a 20% seasonal revenue lift and enhanced in-store brand presence.
 - Led demand forecasting and margin planning using Anaplan and Tableau to align sourcing, pricing, and inventory strategies supporting a projected 25% revenue growth across Pixar and Caribu categories and strengthening account performance.
 - Led GTM strategy execution for new product lines, applying consumer insights and competitive benchmarks to refine product assortment, support account-specific positioning, and drive cross-functional readiness for national retail launches.
- ESE LATAM, Lima, PERU** **March 2022 – July 2022**
Marketing Associate Manager
- Developed and managed the annual sales and marketing budget, leveraging advanced Excel modeling and MS SharePoint to ensure financial discipline and drive a 15% increase in brand engagement across key segments.
 - Led performance-based demand generation campaigns through Google and Facebook Ads, achieving a 10x growth in daily leads and a 25% lift in conversion rates, directly contributing to revenue and ROI objectives.
 - Tracked sales funnel and campaign performance using HubSpot and Google Analytics to identify optimization opportunities, improving reporting accuracy and operational efficiency across cross-functional teams.
- SAN PABLO CATHOLIC UNIVERSITY, Arequipa, PERU** **July 2020 – February 2022**
Marketing and Brand Associate – Graduate Admissions
- Led brand-aligned multichannel campaigns and crafted graduate program narratives, increasing applications by 10% YoY.
 - Ensured consistent brand messaging and visuals across digital, event, and in-person touchpoints while optimizing outreach through tools: HubSpot and Salesforce.
 - Negotiated vendor contracts and managed event logistics for recruitment initiatives, delivering cost-effective and on-time brand activations.
- CHAMBER OF COMMERCE AND INDUSTRY OF AREQUIPA, Arequipa, PERU** **April 2017 – May 2019**
Product Marketing Consultant
- Drove revenue growth by 20% through strategic partnerships and monetization of advertising and sponsorship packages tailored to member needs and market trends.
 - Developed a retention and upsell strategy informed by stakeholder insights, driving stronger member engagement and loyalty.
 - Conducted market and competitive analysis to adjust offering architecture and craft value propositions that strengthened the Chamber's brand identity and boosted member retention.

ADDITIONAL INFORMATION

- **Languages:** English, Spanish, Portuguese and Italian.
- **Computer Software:** Tableau, Cognos, Anaplan, Marketo, HubSpot, Clientify, Google and Meta Ads, MS SharePoint, MS 365, Teams, Google Analytics, Google Tag Manager, SurveyMonkey, Salesforce, SAP Ariba, Concur, S4HANA.
- **Community:** Led a social impact project in Florianopolis, Brazil, creating a marketing plan for NGO Mais União to raise funds for children's education.
- **Interests and hobbies:** Sports: Beach volleyball, swimming, running. Traveling to new countries, reading and dancing.

David McAlpine

(630) 802-6010 | dcmcalpine@gmail.com | New York, NY

PROFILE

Global communications executive with experience leading in-house and agency teams and transforming strategies at B2B and B2C companies. Creative and collaborative storyteller who is well-versed in working directly with senior leaders on communications and public relations strategies. Media relations expert that holds relationships with top-tier business, technology, and lifestyle outlets. Comfortable being a guiding light and right-hand advisor in times of crisis, and a leader for major corporate news moments. **Speaks Spanish (professional working proficiency) and French (limited working proficiency); also speaks and understands some Portuguese, German, Czech, and Arabic.**

EXPERIENCE

Senior Vice President, Corporate and Public Affairs | Burson

New York, NY | Since May 2024

- Advises Fortune 500 & 1000 CEOs and C-suite leaders on earned media and media relations, including corporate storytelling, executive visibility, crisis communications, reputation management, and financial communications
- Develops tailored communications strategies to meet clients' objectives, including IR and public affairs goals
- Leads the media relations arm of Burson's U.S. crisis council, working side-by-side with clients' senior leadership teams to monitor, manage, and respond to business risks and other issues

Interim Vice President, Head of Global Communications | Illumina

New York, NY + La Jolla, CA | September 2023 - April 2024

- Interim lead for corporate communications team of 30, managing internal and external communications globally as Illumina's top communications executive
- Reporting to then-new CEO Jacob Thaysen, lead transformation and change management communications during an enterprise-wide shift in resources, and strategy, including shifting the communications team from marketing to HR
- Managed a multi-million dollar communications budget, including global work across multiple PR agencies

Senior Director & Global Head of External Communications | Illumina

New York, NY + La Jolla, CA | September 2022 - April 2024

- Served as Illumina's chief spokesperson; directly advised CEOs Francis deSouza and Jacob Thaysen on media relations, commercial communications strategies, and social media
- Spearheaded communications efforts for key product launches, times of crisis (regulatory issues, shareholder activism), and high-profile thought leadership moments (Davos, Milken, Aspen, etc.)
- Developed comprehensive strategy across earned, owned, and social media to showcase Illumina's corporate story and the field of genomics by building and fostering relationships across R&D, medical affairs, sales, and marketing teams
- Partnered with IR team to craft earnings narratives, press releases, and support documents quarterly; led efforts to regularly brief reporters and investors on financial results

Director, Broadcast Media Relations | General Motors

New York, NY + Detroit, MI | May 2021 - September 2022

- Served as key adviser to GM senior executives and the communications leadership team for broadcast media strategy and positioning, including direct work with Chair and CEO Mary Barra
- Owned GM's relationships with top-tier outlets like CNBC, Bloomberg, CBS, NBC, ABC, and FOX - among other outlets - contributing to nearly every external media effort across the company
- Used earned media to help establish GM-incubated startups (Cruise, BrightDrop) as household names
- Served as GM spokesperson, ensuring timely distribution of company news and providing updates to journalists

Supervising Producer, *CBS This Morning* | CBS News

New York, NY | November 2019 - April 2021

- Developed original video and digital content for 15 million+ CBS News viewers, leading creative, editorial, and marketing decisions across platforms; directly produced for anchors Gayle King, Anthony Mason, and Tony Dokoupil
- Created and executed budgeting, production, and marketing strategies for high-profile interviews and special coverage

Coordinating Producer, Fox News Channel | Fox News Media

Washington, DC | October 2017 - October 2019

- Organized and led teams of 50+ journalists to produce hours of live coverage, often in challenging and unpredictable conditions like severe weather, natural disasters, and civil unrest
- Developed deep relationships with communications professionals at the White House, the State Department, the Pentagon, and on Capitol Hill to deliver timely and compelling news coverage

Producer, WPVI-TV | ABC News

Philadelphia, PA | January 2015 - October 2017

- Produced the highest-rated local 5 p.m. newscast in the U.S., coordinating across departments to manage the strongest news brand in a top 5 market
- Led special coverage in the field and in the control room for major events including Pope Francis' visit to the U.S., the 2016 presidential election, and the 2017 NFL draft

Producer, KIRO-TV | Cox Media Group

Seattle, WA | June 2012 - January 2015

- Produced hour-long 5 a.m. newscast full of new content daily, working to target key demographics in the Seattle DMA; brought show to #1 in the time period
- Launched KIRO's first Sunday morning newscast; brought the show to #1 in the time period in the first three months

Entertainment Producer & Newswriter, KTLA-TV | Tribune Media Group

Los Angeles, CA | May 2011 - June 2012

- Produced and edited up to 10 daily entertainment segments under tight deadlines
- Coordinated coverage of major entertainment events including the Academy Awards, the Grammys, and the Emmys

AWARDS AND HONORS

- **2022 Children's & Family Emmy Awards** | Nominee: Outstanding Non-Fiction Program
Nominated for 2022 re-launch of Nickelodeon's "Nick News" franchise.
- **2022 News and Documentary Emmy Awards** | Outstanding Live News Program
Won for work on "CBS This Morning" in 2021.
- **2022 North America SABRE Awards** | Finalist: Best Experiential Campaign
Shortlisted for work on the revamp of Chevy's iconic "baseball, hot dogs, apple pie, and Chevrolet" campaign, featuring a partnership with Guy Fieri and an activation at the 2021 MLB "Field of Dreams" game.
- **2020 Daytime Emmy Awards** | Nominee: Outstanding Morning Program
Nominated for work on "CBS This Morning" in 2019.
- **2015 Northwest Regional Emmy Awards** | Outstanding Spot News
Won for KIRO 7's coverage of a deadly high school shooting in Snohomish County, WA.

EDUCATION

The University of Chicago Booth School of Business | Chicago, IL

Master of Business Administration

University of Southern California | Los Angeles, CA

B.A., Broadcast and Digital Journalism; B.A., Neuroscience

ROBERT OSEN

(626) 422-8015 • linkedin.com/in/robertosen • robertosen@gmail.com

PROFILE

MBA-trained brand marketer with a diverse background spanning retail, product marketing, and public relations. Skilled in pricing strategy, consumer insights, and cross-functional collaboration, with global experience across CPG and luxury sectors. I'm now leveraging my expertise to build innovative, consumer-driven brands within the CPG industry.

EDUCATION

University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI 2023 – 2025

Master of Business Administration Candidate, Marketing Specialization

- GPA: 3.6/4
- Recipient of Dean's Full Merit Scholarship
- Reaching Out MBA (ROMBA) Fellow (1 of 2 selected)
- Out4Business Co-President
- Graduate Business Association, Communications Chair

University of California at Los Angeles (UCLA), Westwood, California 2011 – 2015

Bachelor of Arts in Design | Media Arts

PROFESSIONAL EXPERIENCE

University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI 08/24-01/25

Teaching Assistant

- Supported 90 total graduate and undergraduate students in the Digital Brand Building course, teaching concepts of how the digital age reshapes marketing strategy, consumer engagement, and brand growth.
- Held weekly office hours, managed grading, prepared lectures, coordinated disability accommodations, and provided individual student support to enhance understanding and success in the course.

Boston Scientific, Arden Hills, Minnesota 05/24-08/24

Brand Manager – 12 week internship

- Managed P&L strategies for the Electrophysiology (EP) medical device portfolio, setting floors and frameworks to drive a 10% gross margin increase by 2030.
- Conducted a comprehensive margin assessment across global regions, analyzing sales performance and identifying underperforming products, low-margin geographies, and growth opportunities.
- Led a cross-functional project with finance, supply chain, and regional leaders to recommend price uplifts, cost efficiencies, and product bundling opportunities, creating a playbook for ongoing profitability management.

Away Travel, Venice, California 2021-2023

Supervisor

- Generated \$1M+ in personal sales during employment. Consistently among the top 3 sellers for the store.
- Managed a team of ten employees who produced an average monthly sale of \$500,000 and led packaging optimization projects and in-store merchandising refreshes to improve consumer experience and align with brand identity.
- Delivered consultative selling to high value customers, identifying customer needs and creating tailored solutions, mirroring principles of user-centric innovation.

Jimmy Choo, Beverly Hills, California 2019-2020

Public Relations Manager

- Leveraged trend analysis and influencer partnerships to deliver a 20% increase in celebrity product placements, strengthening consumer engagement and brand visibility during the 2019-2020 awards season.
- Wrote approximately 13 press releases per week and pitched to networks of 200+ international media outlets.
- Managed \$21K quarterly budget for purchasing new inventory product from wholesale team.

Salvatore Ferragamo, Beverly Hills, California 2015-2019

Public Relations Coordinator

- Led client relations of 100+ VIP celebrity clients at the flagship Beverly Hills store.
- Pitched new talent for brand opportunities and product launches,
- Organized events such as Elle Magazine x Ferragamo: Young Hollywood Rising Party, and The Wall Street Journal x Julia Roberts' Talents and Legends dinner.
- Collaborated with stylists and talent agencies to identify cultural trends and influencer partnerships, contributing to brand relevance and new product exposure during campaign development.

ADDITIONAL INFORMATION

Software and Tools: AI/LLM, Nielsen, IRI, Circana, Word, PowerPoint, Excel, Adobe Creative Suite (Photoshop, Illustrator, InDesign, AfterEffects), SAP Inventory Management, Retail Data, D365, Launchmetrics, Cision Analytics.

Project Management & Innovation Routines: Familiar with stage gate processes, cross functional alignment, and business case development

Certificates: University of Virginia, Darden School of Business Financial Accounting Fundamentals (Coursera), Inside LVMH

AMANDA TRONCHIN

860-335-3827 | amanda.tronchin@gmail.com | [linkedin.com/in/amandatronchin](https://www.linkedin.com/in/amandatronchin)

Strategic finance and operations leader with 8+ years' experience driving financial performance, unit economics optimization, and operational efficiencies across high-growth technology, healthcare, and startup environments. Proven success developing actionable insights, leading cross-functional collaboration, and enhancing profitability through advanced financial modeling, forecasting, and capacity planning.

PROFESSIONAL EXPERIENCE

Cigna

MBA Finance Development Program: Finance Controller / Bloomfield, CT

October 2024 – July 2025

- Improved margins by 20% through implementing a new forecasting and headcount planning approach to drive efficiency.
- Decreased expense management forecasting error by 10% MoM and increased accuracy to 90%+, by introducing a new predictive model.
- Led headcount strategy meetings, producing increased headcount planning efficiency by 30% and 75% accuracy improvement by increasing communication amongst senior leadership and creating customized reports.
- Reduced month-end and quarter-close processing time by 30% through implementing automation into 5 key monthly processes.
- Increased profitability for the overall business unit by 3% improving tracking of 6 senior leaders' operating expense budgets.

MBA Finance Development Program: Competitive Intelligence Strategist

June 2022 – October 2024

- Led monthly cross-functional meetings consisting of 20 senior leaders, improving market share and penetration by 20% through \$5B cross-industry market competition and competitive landscape analysis to inform the division's growth strategy.
- Increased sales by 15% through partnering with marketing, sales, and product teams, measured by total premiums collected through the development of product positioning, value propositions, and go-to-market strategies.
- Improved medical loss ratio of 20% in 3 major markets as measured by total covered lives through improved product offerings through data-driven monthly senior leadership competitive intelligence research meetings.
- Drove competitive intelligence research exposure by 50% measured by total number of visitors through the creation of a newly created intranet portal.

General Motors

Global Supply Chain and Purchasing Financial Analyst / Warren, MI

February 2018 – August 2020

- Enhanced spend and margin forecasting by 15% by developing predictive models to forecast \$250M in global logistics costs.
- Led and communicated real-time risk and spend management insights with 99% accuracy to 3 executive leaders through weekly morning briefings during crisis periods.
- Collaborated on financial solutions aligned with SaaS tools and cloud automation to enhance decision-making efficiency.
- Conducted financial impact analysis of outsourced operations, highlighting a 20% savings opportunity, contributing to global supply chain optimizations.

Textron Corporation

Finance Leadership and Development Program Participant / *Providence, RI*

January 2017 – November 2018

- Improved financial visibility by 15% for a \$30M SG&A budget by developing automated financial reports.
- Drove 7% cost reduction through spend management initiatives during fiscal year budgetary meetings across 40+ departments.

Associate Financial Analyst / *Wilmington, MA*

July 2016 – December 2016

- Led in-depth financial analysis on control accounts for multiple contracts valued at over \$20 million.

EDUCATION

Purdue University / MBA / 2020 – 2022 - West Lafayette, IN

Boston University / MS, Applied Business Analytics / 2016 – 2018 – Boston, MA

Northeastern University / BSc, Economics and Finance / 2011 – 2016 - Boston, MA

CORE COMPETENCIES

Strategic Finance & Planning | Financial Forecasting & Modeling | Spend Management | Headcount & Capacity Planning | Revenue & Expense Driver Analysis | Cost Transparency & Operational Efficiency | Executive-Level Reporting & Insights

SKILLS & TOOLS

Financial & Program Management: Budget Planning, Forecasting, Scenario Modeling, P&L Oversight, EAC, Spend Forecasting, Invoiced vs Pre-Approved Spend Reporting, Financial Impact Analysis of Outsourced Operations

Technology: Power BI, Tableau, SQL, Excel, Google Sheets, CapitalIQ

Project Management: Agile, Strategic Planning, Stakeholder Engagement, KPI Reporting, Product Portfolio, Operations Support Models

Communication: Executive Reporting, Team Leadership, Relationship Building, Cross-Functional Collaboration

MEGAN V. SMITH

mvsmith80@gmail.com | 210.445.4713 | linkedin.com/in/megan-v-smith

EXPERIENCE

EY-PARTHENON

SEATTLE, WA and PORTLAND, OR

Senior Consultant, Strategy and Transactions; National LGBTQ+ Recruiting Lead

2022 to present

- Advises c-suite executives of \$1B+ companies on organic/inorganic growth strategy, market entry, and commercial transformation across tech, medtech, energy, and industrials
- Owns workstreams from scoping to executive delivery and applies structured problem-solving frameworks and advanced analytics to guide executive decision-making
- Directs and collaborates with cross-functional teams of 30+ spanning operations, product, corporate development, and pricing to align on KPIs, execution timelines, and organizational governance in complex client transformations
- Creates robust financial models and scenario analyses to support long-range planning and strategic M&A roadmaps
- Founded and scaled EY-Parthenon's Org. Strategy Practice, which has enhanced over 25 AI/tech-enabled M&A transformations with direct impact on GTM and operating models

VERIZON COMMUNICATIONS

NEW YORK, NY

MBA Intern, Consumer Marketing

2021

- Led team of five in developing strategy to achieve 26% YoY accessory topline growth through AI, segmentation, and digital marketing; presented plan to executive leads of marketing, 5G, and commercial teams
- Partnered cross-functionally to identify opportunities and shape pricing and GTM strategy in competitive market

MVS POLITICAL CONSULTING

SAN ANTONIO, TX

Founder and Principal

2015 – 2020

- Advised political and advocacy clients on campaign strategy, growth planning, and audience segmentation; managed upwards of 7 engagements simultaneously
- Designed models that improved ROI by up to 141% and enabled rapid scaling with constrained resources
- Led 40+ staff, structured workflows, and implemented agile tracking for real-time performance and execution visibility
- Scaled statewide programs with limited budgets by leveraging operational agility and entrepreneurial leadership

FRANCISCO GÓNIMA EXECUTIVE COACHING & STRATEGY

SAN ANTONIO, TX

Director of Business Operations

2015 – 2017

- Developed and implemented strategic plans for civic programs, including mayoral initiative serving 380K+ annually
- Led planning, communications, and service design for public sector innovations with measurable customer adoption
- Synthesized insights to inform service development, adoption strategy, and customer experience; achieved 18% CAGR

GUBERNATORIAL, STATE SENATE, AND MUNICIPAL CAMPAIGNS

SAN ANTONIO, TX

Voter Contact Strategist

2014 – 2015

- Developed and executed outreach frameworks rooted in behavioral insights and real-time performance metrics
- Scaled regional teams to 400+ members and optimized engagement strategies through agile execution methods

EDUCATION

RICE UNIVERSITY, JONES GRADUATE SCHOOL OF BUSINESS

HOUSTON, TX

Master of Business Administration (MBA)

May 2022

President, Student Government; Councilmember, Graduate Student Association; member, Consulting Club

TRINITY UNIVERSITY

SAN ANTONIO, TX

Bachelor of Arts (B.A.) in Russian and Classical Studies, minor in Latin

May 2014

President, Community Service Club; Senator, Student Government; Member, Classical Studies Honor Society

ADDITIONAL INFORMATION

Leadership: Former VP and Board Member of two nonprofits; alum of competitive business and civic leadership program

Certifications: International Coaching Federation credential

Languages: Spanish and Russian, conversant; alum of Middlebury College Language Schools of Spanish and Russian

Hobbies: International travel, hand-making pasta, and speaking at national conferences on leadership development

JOSEPH KIESEL
JosephEKiesel@gmail.com
(203) 558-8085

Education

THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business, Austin, Texas

Master of Business Administration, Concentrations: Global Business, Public and Governmental Affairs

- External Programs: Entrepreneur Pitch Project for the Ghana Climate Innovation Centre, Sustainable Innovation and Decentralized Technologies Course at Copenhagen Business School, The Washington Campus Residency Course, NOLS Patagonia Leadership Expedition
- Reaching Out MBA Fellow

FAIRFIELD UNIVERSITY, Charles F. Dolan School of Business, Fairfield, Connecticut

Master of Science in Finance, GPA: 3.80

- Financial Modeling Undergraduate Course Mentor

UNIVERSITY OF CONNECTICUT, School of Business, Storrs, Connecticut

Bachelor of Science in Finance, GPA: 3.97

- Awards: Dean's List, Babbidge Scholar, New England Scholar, Beta Gamma Sigma, Summa Cum Laude Graduate

Experience

DELTA AIR LINES, Atlanta, Georgia

2019 – 2021

Project Manager, Financial Modeling

- Created DCF models and business cases to facilitate capital asset acquisition investments, sales, leases and trade agreements for commercial aircraft engines, components and airframes by the Delta Material Services subsidiary
- Teamed with DMS Commercial leadership alongside Delta TechOps and Finance stakeholders to meet organizational needs for technical/MRO cost savings and work volume timing while responding to secondary market dynamics
- Shifted part-time during the COVID-19 pandemic to support finance and accounting functions at Delta Flight Products following their changeover to produce PPE and medical isolation pods

GE CAPITAL and WELLS FARGO EQUIPMENT FINANCE (post-divestment), Danbury, Connecticut

2014 – 2017

Portfolio Management/Loan Resolution Group Analyst

- Managed equipment finance loan/lease accounts covering more than 60 diversified customers with exposure totaling \$375M+, monitoring business operations and credit risk levels via quarterly/annual financial analyses and collateral appraisals to provide appropriate recommendations for senior risk leaders following interactions with sales/underwriting teams and CFOs
- Evaluated compliance statuses relating to UCC documentation in addition to covenant and insurance requirements
- Launched a comprehensive post-acquisition rating project to reevaluate and transition all non-common customer exposure risk levels in line with established WFEF credit standards
- Developed and implemented streamlined document collection procedures and waiver authorizations with process leaders

GE (GLOBAL OPERATIONS), Schenectady, New York

2011 – 2014

Lead Financial Analyst

- Provided estimates, reviews, variance analyses and ad hoc support to applicable organizational leaders to aid in the management of operating expenses and local/global projects associated with healthcare and other benefits-related corporate administrative shared services
- Partnered with operational managers to establish annual/quarterly cost center and project budgets reflecting anticipated business needs and P.O. spending, creating and updating quarterly forecasts in line with evolving planning schedules
- Updated input processes for the annual corporate review process gauging company-wide employee costs in preparation for union negotiations while working to revamp and simplify the long-term data collection/forecasting procedures

Proxy/Compensation Research Associate

- Examined and rated corporate executive compensation programs (in accordance with the provisions of the Dodd-Frank Act) and boards of directors/governance practices to create advisory reports for a primarily institutional investor clientele
- Utilized proprietary modeling techniques to evaluate "pay for performance" metrics against peer companies' financial results and policies to summarize major structural features and disclosure deficiencies of individual incentive plans
- Led a team of junior colleagues and provided feedback for their assessments, revising S&P 500 company review details

Additional Information

- Advanced proficiency with Microsoft Word/Excel/PowerPoint. Skilled with Siebel, Oracle/Hyperion, SAP and Salesforce applications
- Training: Credit Boot Camp / Repayment Risk Assessment (April 2015)
- Languages: French (Intermediate); German (Basic). Extensive travel experiences
- **Work Eligibility:** Eligible to work in the United States with no restrictions

Matthew Kiesow

Email: Matthew.Kiesow@gmail.com | Phone: 309-644-1995

Address: 1700 Golden Gate Ave, San Francisco, CA

[LinkedIn:Matthew-Kiesow](#)

Professional Experience

United Airlines

San Francisco, CA

Program Manager, ENGINE Supplier Management

May 2025, – Current

- Led program management for two Palantir Foundry-based dashboards connected via API, accelerating information flow from two days to real-time and enabling cost savings through operational insights.
- Streamlined reporting workflows by automating daily and weekly shop KPI's leveraging Excel (XLOOKUPS, PivotTables) and VBA, reducing manual processing time by 40% and turnaround time and volume impact reports.
- Oversaw cross-functional account management and analytics initiatives to identify and execute cost mitigation strategies, streamlining maintenance operations and enhancing data-driven decision-making.

SC Johnson Lifestyle Brands

San Francisco, CA

Data Manager Senior - Commercialization

October 2024 – Current

- Developed and launched 9 interactive Power BI dashboards leveraging Circana and Nielsen syndicated data to track brand KPIs, identify category trends, and inform competitive strategy for national retail partners.
- Led User Acceptance Testing (UAT) for Market Insight dashboards, achieving a 100% success rate with minimal user feedback. Captured and tracked input via Jira, partnering with developers to ensure solutions met business needs within platform constraints.
- Validation & Analysis: Cross-referenced model outputs with legacy ERP and syndicated platforms using Excel functions (Pivot Tables, XLOOKUPS) to ensure data integrity and support strategic decision-making.

Account Manager - Customer Supply Chain

Sep 2022 – Dec 2023

- Managed client accounts using Circana data, ensuring high-quality data insights and accurate reporting for top U.S. and Canadian retailers. Improved client satisfaction and data accuracy across strategic projects.
- Increased sales by 57% (\$8M) by leveraging SAP and custom data trackers to streamline supply chain processes, leading to reduced time on time-sensitive inventory inquiries.
- Delivered comprehensive training on Global Operations Center (GOC) processes to cross-functional teams, driving consistency in client service and data management.
- Spearheaded the integration of client master data, ensuring compliance with industry regulations and improving accuracy in financial workflows.

Customer Supply Chain Analyst

Sep 2021 – Dec 2022

- Analyzed and corrected syndicated data (via Circana) for over 1000 retail accounts, improving data integrity and ensuring seamless content delivery across key accounts.
- Led the integration of customer feedback into actionable insights, helping sales, marketing, and category management teams make data-driven decisions.
- Developed project management tools in Excel, reducing process time by 30%, and enabling efficient tracking of ad-hoc requests and ongoing client projects.

Communications Associate: Consumer Response

May 2019 - Feb 2021

- Led category redevelopment based on consumer and shopper insights including Amazon Vendor Central findings. Presented executive presentation and recommendation for portfolio relaunch of brand category.
- Partnered with business stakeholders to automate Press Release kits processing workflows in SAP, enhancing operational efficiency and reducing manual errors, with a 99% on-time project delivery.

Education

University of San Francisco – San Francisco, CA

Master of Business Administration, Marketing Analytics

Sep 2021 – Dec 2023

- **Certifications:** Tableau Data Management
- **Leadership:** Director of External Affairs, Graduate Marketing Association

San Francisco State University – San Francisco, CA

Bachelor of Arts, Communications Studies

Sep 2020 – Dec 2021

- Graduated **Summa Cum Laude**, Merit-Based Scholar
- While working 40 hours full time.

Timothy Wong

MBA, BE(Electrical & Electronics Engineering) (Hons 1), BCompSci

(669)-600-9258 | timothy.wong@ieee.org | <https://www.linkedin.com/in/timothywong1>

Senior Program Manager

Education

UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN - Master of Business Administration. GPA: 4.0. Phi Kappa Phi and Beta Gamma Sigma honor society.

UNIVERSITY OF WESTERN AUSTRALIA - Bachelor of Electrical & Electronics Engineering (First Class Honors) and Bachelor of Computer Science. Valedictory speaker.

CURTIN UNIVERSITY - Graduate Certificate of Finance

Work History

AMAZON

Senior Program Manager: Renewable Energy Development Program

2022 – present

- Identified and mitigated project risks (interconnection, permitting, land) for ~4 GW+ of renewable energy VPPAs (\$400M+).
- Developed a financial model to analyze renewable energy basis risk—a projected \$500M+ challenge, and authored strategic recommendations paper for contractual solutions and battery storage alternatives.
- Performed technical assessment for ~2 GW of Grid Delay requests in AMER, EMEA, and APAC, saving ~\$100M annually.
- Secured \$1.4M funding for the Oregon Community Rooftop Solar program, enhancing renewable energy access for underserved communities and creating workforce development opportunities.
- Designed in-house tools and reporting systems for Renewable Energy Project Due Diligence and Independent Engineering tracking (\$1.5M) to enable \$400M+ in renewable energy projects.
- Implemented process improvements for grid delay workflows, engineering due diligence, funding, and established technical assessment guidelines to achieve a 15%+ reduction in processing time.
- Established automation tools for auditing water usage across 475 data center sites globally.
- Collaborated with real estate, legal, power, water, and fiber teams to develop an alternative data center siting method.
- Developed processes to standardize workflows, including due diligence, grid delay processing, and vendor management.
- Provided technical expertise to develop a Responsible Energy Buying Cost Benefit Analysis Framework.
- Created a toolkit to assess the technical and commercial feasibility of transmission line fiber.

Contract Positions

2016 - 2022

ComEd - Project Manager (via CRS Group) (2020 – 2022)

- Led and mentored the project support team in Grid Modernization Fiber, System Cable, and Voltage Optimization projects (~\$100M+), leading system enhancements and process optimization.
- Created comprehensive project progress reports such as program work downs, and remediating data quality issues.
- Developed new operational processes to streamline contract requisition, payment processing, data governance, and reporting automation, alongside developing audit tools for enhanced productivity.

Self-employed Energy Consultant (2019)

- Assisted USA utilities with grid modernization initiatives contributing to initiatives like Smart Cities, alternative business models, advanced inverter technology, and regulatory support, through performing research and analysis.
- Delivered IT, administrative, and business operations support, including in-depth research and analysis.

NSW Department of Planning and Environment - Clean Energy Programs Project Officer (2017 – 2018)

- Developed energy programs and ensured NSW Energy Savings Scheme commercial lighting changes achieved intended policy outcomes through targeted and public consultation.
- Performed technical investigations into battery storage standards, renewable energy generation connection standards, and energy demand forecasting methodology.

Moreland Energy Foundation - Consultant and Technical Lead (2016 – 2017)

- Performed energy efficiency audits and provided advice to (~200) households and small businesses, incorporating appliance

retrofit, energy tariffs, renewable energy, and behavioral change opportunities.

- Led and executed solar PV and energy storage feasibility studies including technology investigations and energy modeling, and identified financial savings (15 - 30%) for clients.

ATCO

Business Development, Project Development Engineer

2015 – 2016

- Pursued and developed build, own and operate opportunities (up to \$100M value) across power generation and gas pipeline infrastructure.
- Gathered customer needs and developed economic models with consideration for cost-effective options, including alternative facility configurations, operation logic, financing, capital, lifecycle operating and maintenance cost, fuel and heat rate inputs, and environmental considerations.
- Wrote and coordinated RFI/RFP proposal responses and investigated market opportunities.

HORIZON POWER

Power Systems Planning and Islanded Systems Development – Sustainable Energy Solutions, Electrical Engineer

2009 – 2014

- Led the development of long-term power distribution and generation supply strategy plans for 9 microgrid towns by evaluating electric distribution system adequacy and determining optimal system upgrades.
- Developed conceptual design options for electrical distribution system upgrades and collaborated with other workgroups (operations, finance, energy forecasting, business development) to reach consensus.
- Performed comparative economic analysis, utilizing financial models (NPV) on long-term power supply/upgrade options, including analysis of IPP contracts, power system reinforcements, NWAs and PPAs.
- Pursued clean energy options such as hybrid solar-diesel systems for decarbonizing and reducing cost to serve in regional Western Australia.
- Provided energy efficiency outreach and education to Australian indigenous communities.

VOLUNTEERING:

IEEE Young Professionals Chairperson/Program Manager – Global Operations and Strategy

2011 – 2015

- 2015 MGA Leadership Award. Asia Pacific Young Professionals Program Manager (2011-2012). Past Chairperson (2015)
- Negotiated and obtained MGA board approval for new global IEEE Young Professionals membership program.
- Rebranded and revitalized Young Professionals global membership reaching over 100,000 members worldwide across 160 countries. Launched in 2014 at Sections Congress.
- 20 direct reports. Managed marketing, leadership & training, volunteer development, and strategic partnerships portfolios.
- Introduced project management methodology and tracking, and new member benefits such as: IEEE Young Professionals YouTube channel, global Young Professionals email newsletter and blog.

Social Responsibility and Community

- 2022 Reaching Out MBA representative (University of Illinois Urbana-Champaign)
- Out in Tech – Chicago
- Young Professionals of Streeterville

JASON C. FORTE

Jason.C.Forte@gmail.com | San Francisco, CA | [linkedin.com/in/jasoncforte](https://www.linkedin.com/in/jasoncforte) | US Citizen | 312-749-7002

EDUCATION

UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

Master of Business Administration

Chicago, IL

2013 - 2015

MASSACHUSETTS INSTITUTE OF TECHNOLOGY

Bachelor of Science in Management Science

Cambridge, MA

2005 - 2009

EMPLOYMENT

GOOGLE

Head of Ads Reporting, Pitching & Insights Automation (Solutions Engineering Manager)

San Francisco, CA

2022 - July 2025

ACCENTURE STRATEGY, GRANT THORNTON

Strategy Consulting Engagement Manager

Strategy Senior Consultant

Chicago, IL

2017 - 2022

2015 - 2016

ELECTRIF.AI (formerly Opera Solutions, a data science and AI consultancy)

Business Analyst, Promoted to Associate

New York, NY

2010 - 2013

GOOGLE EXPERIENCE

Role: Head of Ads Reporting, Pitching & Insights Automation (Solutions Engineering Manager)

- Lead the gTech Ads Authoring team (international team of 7 direct report FTEs & 26 vendors) to automate work via automated collateral in Google's CRM, AI solutions, dashboards & other solutions/tools
- Duties
 - Launch 8-10 automated solutions per quarter by partnering with cross-functional teams (sales, customer support, product teams, engineering, privacy, security) to understand, define and deliver on impactful automation needs
 - Maintain the existing portfolio of 120 automated sales pitching and reporting solutions on Google's CRM system
 - Partner with Customer Solutions Engineers to scale up global customer solutions across other large customers
- Key Impacts & Accomplishments
 - Revenue & Usage
 - Saved 1.6M hours of labor by automating ~120 deliverables generated 1.8M times by 13k internal users in 2024
 - Generated \$1.1-4.6B (~1-3.5%) in incremental revenue annually as estimated by Sales Impact Council by improving productivity of sales and gTech teams via automation of pitching and reporting work
 - Scaled 110 technical solutions across sales, supporting 138 technical plans, covering \$17.6B in ads revenue in 2024
 - Strategy & Operational Efficiency:
 - Overhauled team operations after headcount reduction (11 to 5) to maintain impact and meet stakeholder needs
 - Increased launches per capita 75% via process improvements, role/responsibility changes, and xfn alignments
 - Increased collateral usage among key user demographic by 50% yoy without new launches via a targeted needs assessment, communication, training and adoption improvement program
 - Decreased case handling time 9% by launching automation adoption efforts among customer support team
 - Doubled number of bugs and feature requests handled per FTE by transforming key roles and responsibilities
 - Increased operational rigor regarding project management, impact measurement and adherence to best practices

SELECT CONSULTING EXPERIENCE

- Sales Operations Project for a Fortune 50 technology company:
 - Led team of 4 to design a new worldwide sales operations governance model for 7 BUs and 5 cross-BU support teams
 - Increased OKR metrics achievement rate 7% by speeding up investments and realignments via the new model
- M&A Strategy Project for a top 3 global payment technology company:
 - Identified \$2.1B/yr in incremental revenue opportunities and cost efficiencies from a \$20B acquisition
 - Evaluated growth opportunities across customer segments, in addition to potential bolt-on acquisition targets
- Digital Strategy Project for a super-regional bank:
 - Led team of 3 to design the website and app of the future by analyzing market drivers and user experience research
 - Program-managed 60+ staff across engineering, vendors, marketing and ops teams for bank app/site build & launch
- Growth Strategy Project for top 5 US pharmaceutical and consumer goods company:
 - Analyzed a \$3B/yr market, and presented 5 actionable product and marketing insights for sales and user growth
 - Identified \$50M/yr of new market entry and customer acquisition opportunities by using internal and external data
- Data Science/Analytics Project for a consumer subscription brand:
 - Implemented a SAS-based machine learning model to predict customer attrition and personalize retention efforts
 - Architected full lifecycle from creation to launch, integrating feedback and decreasing attrition by 120 basis points

BRADFORD REILLY

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CAREER SUMMARY

As a graduate of the AT&T Leadership Development Program, I have a breadth of experiences across the business. I am a customer-focused professional with 10+ years of experience who leverages data-driven decision making and extreme collaboration. I lead with authenticity and transparency to foster a powerful network to drive impactful business results.

SKILLS

- Strategic Oversight & Integration
- Operational Analysis
- Cross-Functional Collaboration
- Brand Strategy
- Offer Development
- Process Analysis and Governance
- Transformation Management
- Multi-Channel Campaign Design
- Customer Segmentation Analysis

EXPERIENCE

AT&T, Dallas, TX

Lead Product Marketing Manager (Migrations)

April 2024-Present

- Accelerated bold converged test offers to market, reaching 7K customers monthly, generating 5% lift in wireless sales
- Orchestrated a strategic IP conversion campaign for a 4.8K customer base, contributing \$160M in revenue growth
- Championed a multi-segmented 2-way SMS campaign targeting consumer fiber audiences, driving 2.5% lift in wireless sales
- Directed highly-regulated legacy migration campaign for 200K+ customers, reducing wireline operational cost and generating \$10.4M in copper transformation revenue over 5 years
- Authored multi-channel policy updates to facilitate customer migration to fiber, generating 5K gross monthly wireless adds

Lead Product Marketing Manager (Customer Lifecycle Management)

October 2022-April 2024

- Negotiated vendor contracts, reducing costs by 40% (\$100K annual) to improve call-center efficiency and productivity
- Streamlined multi-channel copyright touchpoints by 30%, expediting customer behavior change to mitigate legal risk
- Facilitated \$1.7M Copyright platform migration, in collaboration with tech dev, operations, legal, brand, and vendor partners
- Connected marketing, product, and commercialization teams to establish cross-organizational strategic integration
- Leveraged segmentation and competitive analysis to ignite 80 customer-focused initiatives addressing MVNO pain points

Senior Manager Brand Insights and Analysis (Leadership Development Program)

March 2022-October 2022

- Presented Voice of Customer analysis on value proposition relative to competitors, driving strategic marketing alignment
- Designed engagement data visualizations for six new advertisements, uncovering brand resonance with PGA audiences

Privacy Analyst (Leadership Development Program)

July 2021-March 2022

- Presented nationwide baseline strategy to legal and supply chain strike teams to ensure smooth operational execution
- Developed job aids for the privacy governance platform, eliminating redundancies and increasing process adoption
- Researched industry best practices to refine training and privacy office's internal brand perception

AT&T, Richardson, TX

July 2020 – July 2021

Manager—Credit and Activations (Leadership Development Program)

- Coached team of 17 high-performing reps to improve operational efficiencies by at least 1 percentage point per metric
- Instituted new call script using agent feedback to decrease handling time and increase QC metric 5 percentage points

AT&T, El Segundo, CA

June 2019 – August 2019

Intern—Acquisition Strategy Manager (Leadership Development Program)

- Launched mystery shop program in 1,500 stores to measure offer effectiveness, improving close rates and customer experience
- Managed \$150M budget to design quarterly-launched strategic promotions, achieving acquisition targets for video products

EDUCATION

Kelley School of Business, Indiana University, Bloomington, IN

Graduated: May 2020

Master of Business Administration, Consumer Marketing and Corporate Innovation

RECOGNITION & VOLUNTEER

Connection Award, October 2023 for work within the Accelerator and leadership within the Copyright Program

Presidential Volunteer Award, 2022 and 2023 for 200 hours of service to communities within Dallas, TX and AT&T

AT&T LDP Toastmasters President Ensured membership completion of the Toastmaster's Curriculum.

AT&T LEAGUE LGBTQ Employee Resource Group, DFW Chapter—Board (2020 to 2023)

973.508.8965

Eric Mingelgreen

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EDUCATION

CARNEGIE MELLON UNIVERSITY TEPPER SCHOOL OF BUSINESS

Pittsburgh, PA

Master of Business Administration – MBA

05/27

- Concentrations: Business Analytics, Finance
- Track (Major): Technology Strategy & Product Management
- Clubs: Business & Technology, Tepper Graduate Consulting Club, Out & Allied

UNIVERSITY OF MASSACHUSETTS AMHERST

Amherst, MA

Bachelor of Science, Isenberg School of Management

05/22

EXPERIENCE

UBS

Weehawken, NJ

Associate Director, Banking Field & Client Messaging (03/25 – present)

08/22 – Present

- **Digital Integration:** Advised on and implemented digital automation strategies using Microsoft Power Platform and RPA (robotic process automation), enabling scalable solutions for high-volume, complex workflows, saving 30 hours each month
- **Cross-Functional Leadership:** Drove group-wide adoption of a new compliance technology platform.
- **Campaign Oversight:** Streamlined campaign development; supervised strategic execution and adherence to process.
- **Data Engineering & Modeling:** Designed and deployed a robust Power BI reporting solution by migrating legacy multi-workbook Excel systems into a centralized, scalable architecture with semantic data modeling, automated data pipelines, and dynamic visualizations.
- **Awards** – UBS Three Keys “Above and Beyond” Award, 2024

Bank Messaging Review Analyst (08/22 – 03/25)

- **Compliance & Risk:** Led marketing compliance reviews across three banking products, reducing regulatory exposure; processes helped to close out 3 non-financial risk incidents, successfully passed multiple internal audits.
- **Process Optimization:** Analyzed and reengineered business processes to increase efficiency, mitigate risk, and reduce reliance on human resources.
- **Collaboration:** Worked closely with stakeholders across business, compliance, and technology to support initiative execution, clarify requirements, and maintain alignment throughout project lifecycles.

TD Bank

Bernardsville, NJ

Teller Manager & Regional Operations Lead (01/20 – 08/22)

06/17 – 08/22

- **Process Improvement:** Streamlined hiring and training workflows; co-authored the bank-wide “Teller Manager Survival Guide,” a job aid still in use across ~50 branches
- **Operational Analysis:** Tracked and reported success metrics for 23 regional branches to inform leadership decisions and identify performance trends.
- **Operational Excellence:** Led daily operations for the Bernardsville location, ensuring compliance, service quality, and team performance.
- **Issue Resolution:** Served as escalation point for operational issues across regional branches, recommending solutions to improve consistency and reduce risk.
- **Awards** – WOW! CEO Leadership Award, 2020

Branch Representative (06/17 – 01/20)

- **Client Service:** Delivered high-quality customer service and supported daily transactions, building foundational knowledge of retail banking operations.

SKILLS & CERTIFICATIONS

- Technical skills: Programming (Python, R, JavaScript, M, SQL); VBA (advanced Excel); Microsoft Power Apps, Power Platform, Power Automate; Enterprise software administration
- Certifications: Alteryx Designer Core, Microsoft PL-300 Data Analyst

INTERESTS & AFFILIATIONS

- Affiliations: Treasurer, UBS Pride & Allies ERG (1800 members)
- Interests: Reading, exercising, unclehood, baking, going to Broadway shows

Eric E. Bayir

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Professional Summary

Accomplished strategy consulting manager with 8 years of experience in pharma and biotech industries. Proven expertise in fact-based product forecasting and valuation, market/opportunity sizing and benchmarking analysis, and R&D/commercial AI. Continuous track record in delivering strategic insights to support go-no go decisions, new product launch, and go-to-market strategy. Experienced in developing competitive intelligence, long-term forecasting, model design, analog search, and scenario/sensitivity analysis. Adept at building and managing relationships, leading matrix teams, and giving data-driven recommendations to inform business decisions

Experience

WINDROSE CONSULTING GROUP – Conshohocken, PA

Engagement Manager, Strategy Consulting, Pricing and Market Access

April 2025 – Present

- Drafting project proposals for business development, identifying analogues, creating a storyboard, and defining approach
- Delivering the assigned projects, supervising and mentoring analysts in the office to ensure excellent project management

IQVIA – King of Prussia, PA

Manager, Strategy Consulting, Enterprise Transformation

September 2022 – April 2025

- Led cross-functional delivery, serving as lead for pharma/biotech projects on forecasting, valuation, and commercial AI
- Designed 8+ financial models to forecast asset valuation, NPV/revenue growth trends based on competitive intelligence
- Developed business cases by analyzing diagnosis / prescription claims data, sales data, analog pricing / uptake scenarios
- Developed KOL/HCP/payer/patient primary market research screeners, discussion guides, surveys, and product profiles
- Performed secondary research on epidemiology, competitive landscape, pipeline assets, approved drugs, analog pricing
- Conducted primary research interviews with 50 KOLs, 100 HCPs, 30 payers across oncology, rare disease therapy areas
- Built and mentored a high-performing team of 5-20 consultants, coached them on individual strengths and growth areas
- Supported business development through project proposal creation, including approach design, timelines, and budgets

ZS ASSOCIATES – Princeton, NJ

Strategy Insights & Planning Consultant, R&D Excellence

December 2019 – September 2022

- Directed teams of 3-15 people, managed client engagements, addressed client needs on clinical development and R&D AI
- Crafted strategic roadmaps and facilitated workshops of 10-15 people to align project objectives with business strategies
- Demonstrated leadership in developing pharma brand strategies, segmentation, targeting, positioning, product-market fit
- Conducted primary market research (PMR) with 100 patient surveys and 25 HCP interviews, analyzed drug receptivity
- Built relationships with KOLs, physicians, payers across various therapeutic areas (oncology, rare disease, hematology)
- Performed hands-on secondary research and delegated the work to junior team members, oversaw/ensured work quality

TEMPLE UNIVERSITY – Philadelphia, PA

Consultant, Office of Business Services

September 2018 – June 2019

- Managed long-term contracts and vendor relationships, performed sales data analytics/audits and ensured compliance
- Created and updated online marketing content, and authored data analytics reports for departmental sales performance

FOX MANAGEMENT CONSULTING – Philadelphia, PA

Consultant, Enterprise Management Consulting

September 2018 – December 2018

- Provided strategic consulting for a Fortune 500 client on the customer-centric future contact center cloud technologies
- Developed PMR materials, conducted PMR, interviewed experts, identified trends, developed strategic recommendations

HYGEA PRECISION MEDICINE – San Francisco, CA

Consultant, Strategy and Marketing

June 2018 – August 2018

- Identified opportunity by stakeholder, ecosystem, size, segmentation, trend analysis; formulated go-to-market strategy
- Developed PMR materials and surveys; conducted HCP PMR and patient survey, analyzed data, prepared investor pitch

UNIVERSITY OF PITTSBURGH – Pittsburgh, PA

Senior Data Research Specialist, Critical Care Medicine

August 2016 – July 2017

- Collaborated with preclinical research teams to drive data-driven decisions and managed preclinical research projects
- Designed experiments, applied advanced data analytics, and reported findings to leadership in monthly presentations

Education

- TEMPLE UNIVERSITY, Fox School of Business, *MBA, Business Administration and Management*
- UNIVERSITY OF PITTSBURGH, School of Arts and Sciences, *M.Sc. Molecular, Cellular, Developmental Biology*
- BILKENT UNIVERSITY, Faculty of Science, *B.Sc. Molecular Biology and Genetics*

SHAWN PATTON

(714) 343-6683 | shawn.j.patton@gmail.com | Chicago, IL

EDUCATION

THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

Chicago, IL

Master of Business Administration (Strategic Management, General Management, Behavioral Science, Entrepreneurship)

Jun 2025

- **Awards:** Chicago Booth merit-based scholarship; Dean's Honor List; Booth Impact Award (Dean's award for impact on Booth community)
- **Booth Consulting Club, Co-Chair:** Streamlined on-campus recruiting for part-time students; advocated for policy change, developed new processes, presented plan to university; removed barriers and expanded access to career opportunities for current and future members.
- **Consulting Lab:** Created international GTM strategy for professional sports team; built robust Excel database, analyzed consumer data, presented final recommendations to C-level management; firm adopted growth strategy valued at \$10M+.
- **Social Impact Consulting:** Developed growth strategy for Chicago nonprofit educating previously incarcerated fathers; conducted competitive analysis, sized market, and analyzed data in Excel to identify growth opportunities; presented strategy to board.
- **Booth Pride, Co-Chair:** Executed 14+ events, engaged 450+ LGBT students; grew membership by 40%.

UNIVERSITY OF CALIFORNIA, IRVINE

Irvine, CA

Bachelor of Arts in International Studies

Jun 2009

- Studied abroad at University of Bologna, Italy for 2007/8 academic year; took coursework in politics, history, and sociology.

EXPERIENCE

WORLD EDUCATION SERVICES

New York, NY

Senior Business Development Partner, North America

Jan 2024-Present

- Developed strategic partnership with one of largest university systems; aligned solution with client needs and led cross-functional team to onboard client and operationalize key processes and integrations; negotiated and closed largest deal valued at \$4M ARR.
- Designed and executed market expansion strategy for South Asia; conducted in-country research in India to gather market intelligence, built executive relationships with public and private sector stakeholders; delivered \$30M growth plan later adopted by senior leadership.
- Led API integration initiative to streamline data transmission with clients; presented on technical capabilities and benefits of integration with CTO for audience of 500+ EdTech leaders; led to 16% increase in new product adoption (largest on record).
- Trained and mentored a team of 5 junior staff to support client onboarding; designed step-by-step training materials, led hands-on sessions; and provided ongoing coaching to build internal capacity; enabled team to manage new client support independently.

Regional Director, Institutional Relations

Nov 2019-Jan 2024

- Created growth strategy for regional new client acquisition; analyzed industry data through Excel, Tableau, and AI tools and developed model to identify and prioritize high-potential leads; launched B2B client acquisition plan and grew sales 37%.
- Steered multi-department collaboration with Finance, Operations, and IT to scope and deliver tailored digital solutions for high-value client; efforts contributed to acquisition of the largest new client valued at \$600K ARR and strengthening of delivery infrastructure.
- Designed and launched first structured B2B sales funnel for the organization; operationalized structure in Salesforce, developed KPI dashboards to increase team's visibility with leadership; surfaced \$1M in previously untracked revenue.

EYELLIANCE

New York, NY

Director of Membership

Jul 2018-Jan 2019

- Built and launched the organization's first Salesforce infrastructure to manage member relationships; created workflows, data structures, and reporting tools that enabled cross-team collaboration and drove a 25% increase in membership within six months.

INSTITUTE OF INTERNATIONAL EDUCATION

New York, NY

Program Manager, Center for International Partnerships

Jul 2015-May 2018

- Managed \$2M U.S. State Department program; oversaw 16 international teams, ensured compliance and reporting, and authored impact evaluation that shaped policy discussions on climate, energy, and public health.
- Advised 50+ universities on institutional growth strategies, facilitating planning sessions with presidents and provosts to design international partnership models; forged 100+ collaborations across Asia and LATAM.
- Facilitated workshops for 200+ education leaders in Myanmar, collaborating with government agencies and U.S. Embassy; presented strategy recommendations to Minister of Education, resulting in creation of country's first international education association.

Program Officer, Experiential Learning

Feb 2014-Jul 2015

- Oversaw program operations for \$10M+ scholarship portfolio spanning 100+ higher education clients; negotiated \$500K+ in aid packages and supervised placement of 200+ STEM students at U.S. universities.

EARLY CAREER EXPERIENCE:

Irvine, CA; Madrid, Spain; Zamora, Spain

- RUSHMORE LOAN MANAGEMENT SERVICES, Compliance Analyst
- SPANISH MINISTRY OF EDUCATION, Teacher
- SPANISH MINISTRY OF EDUCATION, Teacher

Jul 2013-Feb 2014

Aug 2011-Jun 2012

Oct 2009-Jun 2010

ADDITIONAL

- **Languages:** Spanish (advanced), Italian (advanced).
- **Technology:** Data analysis (Excel, R, Tableau), AI/machine learning (ChatGPT), Microsoft Office, Salesforce, project management (Jira).