



MAX PATEL

WORK SAMPLES & PORTFOLIO

LVMH

NVA

ESTÉE
LAUDER
COMPANIES

vmware

UNDER ARMOUR

BELCORP

eMolecules

FRONTIER
SCIENTIFIC

NIKE

NEW YORK &
COMPANY

JPMORGAN CHASE & CO.

McKESSON

Mister
CAR WASH

TOYOTA
FINANCIAL SERVICES



”

HI!

I'M MAX. I'M AN EXECUTIVE PROGRAM LEADER, MARKETER, AND STRATEGIST KNOWN FOR TRANSFORMING VISION INTO REALITY!

I am a keen strategist and a strong implementation leader, dedicated to solving problems, defining solutions, connecting with customers, and leading successful programs. With a proven track record of working with large Fortune 500 companies, I leverage my strong business acumen and technical expertise to develop modern solutions that drive revenue, increase efficiency and effectiveness, enhance customer loyalty, and reduce costs.

With over 20 years of experience, I excel in managing cross-functional teams, development projects, led creative resources, managed M&A strategies, SAP Programs, and global initiatives, and even led large transformations. I foster strong strategic partnerships and align user needs with actionable strategies. My expertise in leveraging emerging technologies, data, automation, and AI tools has consistently enhanced operational excellence, driven organizational growth, and supercharged marketing efforts.

As a trusted advisor and partner, I am committed to delivering solutions that solve complex problems, accomplish missions, and achieve goals. I am excited about the opportunity to bring my dedication and expertise to new challenges, where I aim to drive and support marketing and customer-outreach strategies and initiatives to enhance and support strategic objectives and

TABLE OF CONTENT

A LITTLE ABOUT ME	04
-------------------	----

-

CASE STUDIES AND WORK SAMPLES	05
-------------------------------	----

- ESTEE LAUDER COMPANIES 6
- FESTO 7
- LVMH 8
- NATIONAL VETERINARY ASSOCIATION 9
- NIKE 10
- VMWARE 11
- TOYOTA 12
- MISTER CARWASH 13
- BELCORP 14

TESTIMONIALS AND RECOMMENDATIONS	15
----------------------------------	----

RESUME	16
--------	----

A LITTLE ABOUT ME

PERSONAL AND PROFESSIONAL

Hey there! I'm Max Patel, an executive program leader, Harvard mind, and strategist who loves turning big ideas into reality. With over 20 years of experience, I've had the pleasure of driving innovation, business transformation, and achieving superior results across various industries. Here's a bit about me:

- **Educational Background:** I've got an MBA and a Master's in Industrial Organizational Psychology from Harvard University. These degrees have given me a solid foundation in business strategy, understanding how organizations tick, and an insiders view into customer thought patterns and behaviors.
- **Professional Achievements:** I used to own a business, PM Principle, which I successfully led to an exit. One of my proudest moments was taking over a failing technical modernization program from Deloitte and BCG. I turned it around, managing over 48 senior-level executives and oversaw a \$550M budget.
- **Personal Interests:** When I'm not working, you'll probably find me at the gym. I'm a bit of a fitness enthusiast and love staying active and fit—in both mind and body.
- **Family and Relationships:** I'm known as the favorite son and the best uncle ever. My family means the world to me, and I cherish the time I spend with them.
-

My journey has been all about blending strategic thinking with technical know-how and a commitment to excellence. I'm passionate about solving problems, finding solutions, and leading successful projects. Whether it's boosting revenue, improving efficiency, or cutting costs, I bring a unique mix of skills and experiences to every challenge.



CASE STUDIES & WORK SAMPLES

I want you to know and see what I've done and the value I've brought in the past. I have detailed work samples and recommendations to share upon request.



CASE STUDY: Estée Lauder Companies

Estée Lauder Companies, a Fortune 500 company, is one of the largest and most influential cosmetics companies globally. In fiscal year 2024, the company reported net sales of \$15.61 billion, maintaining its strong market presence despite challenging economic conditions.

Reporting directly to esteemed C-suite executives (CIO, Chairman Ametrias, CCO, and CIO), I led Deloitte, BCG, PwC, and Estee Lauder Companies personnel in the global transition of all enterprise assets and functions to SAP (HR, formulas, Supply Chain, vendor partnerships, financials, and more).

I was responsible for overseeing a P&L of over \$559 million, 47 executive reports, 14 vendors, and the overall success of the program.

SITUATION

Estee Lauder Companies was in the process of transitioning the company and its current technical resources to the SAP platform. The program included all SAP supported functions, globally, across all brands, and companies. Program budget was in excess of \$500M with a challenging four year timeline.

COMPLICATION:

One year into the program, no progress was made. Global footprint was not established, RICE objects were not defined, and transition plan had not been established. A strong program leader was needed to align all SAP processes and get the program back on track.

PROBLEM STATEMENT

How can the program be better aligned and managed (personnel, process, technology, and vendor resources) to obtain the strategic objective and transformational goals required? And what was keeping the program from achieving the goals in the current state?



Turned around SAP program within 6 months, created 32 separate project plans integrated into one master Program Plan. Aligned all resources.

Brought program in on time within budget, and meeting strategic objectives!



Created and launched strong governance and reporting process, practice, and mechanism



Created and launched PMO and CSO globally across all brands, regions, and functions!

CASE STUDY: FESTO

7

Festo is a global leader in automation technology and technical education. Specializes in advanced robotics, automation, and manufacturing solutions, serving a wide range of industries worldwide, the company boasts a revenue of €3.81B, Festo is renowned for its innovative products and commitment to sustainability. The company operates in about 60 countries and employs around 20,500 experts who contribute to its mission of making the working world more productive, simpler, and sustainable.

PROBLEM STATEMENT / ISSUE TO BE SOLVED:

Festo faced the complex challenge of integrating the newly acquired company into its existing operations. The primary issues included:

1. **Operational Alignment:** Ensuring that Lab-Volt's operations were seamlessly integrated with Festo's advanced robotics, automation, and manufacturing systems.
2. **Cultural Integration:** Merging the distinct corporate cultures of Festo and Lab-Volt.
3. **Product and Market Strategy:** Harmonizing product lines and market strategies.
4. **Cost Efficiency:** Identifying and implementing cost-saving measures to enhance overall operational efficiency and profitability.

Addressing these challenges was crucial to realizing the full potential of the merger and achieving Festo's strategic objectives.

CHALLENGE:

- Bi-furcated management structure with multiple layers
- Strong company and cultural identity on both sides
- Non-inclusive strategy
- No post merger initiatives (people, process, or technology)

APPROACH:

- Create and deploy a post-merger initiative (people, process, and technology)
- Create, implement, and oversee strategy office, project management, and other functions
- Develop and lead company

SOLUTION:

- Launch a post-merger integration initiative to unify people, process, and technology
- Communicate and align strategy and strategic objectives
- Create a flatter organizational structure
- Develop integrate product roadmap

RESULTS:

- Successful integration leading to a stronger, unified workforce and sales team
- \$42M revenue increase
- Founded and launched new product
- Turned around failing business unit into a \$5M revenue generator

\$42M
Revenue Increase

25%
Increased Sales
capability and
capacity

\$15M
Cost Savings

↑
Stronger, unified,
and aligned
company and
workforce!!!

CASE STUDY: LVMH

LVMH Moët Hennessy Louis Vuitton is a multinational luxury goods conglomerate, renowned as the world's leading luxury products group. In 2023, LVMH achieved a record-breaking revenue of approximately \$93.7 billion USD, with profits from recurring operations reaching around \$24.8 billion USD. This financial performance underscores its dominant position in the luxury sector, encompassing over 75 prestigious brands globally.



SITUATION:

Like all large conglomerates, the LVMH Enterprise has a technical shared services model that allowed regions to commission and consume services from the Enterprise. This allowed the Enterprise to 'sell' services to the regions without any profit mark-ups.

COMPLICATION:

- All regions are required to use enterprise services at their cost.
- Cultural conflict / Internal trust issues
- Conversion costs apply
- Enterprise control over regional marketing
- Strained governance

PROBLEM STATEMENT / ISSUE TO BE SOLVED:

LVMH faced significant challenges gaining adoption of enterprise-shared services across regional markets and their marketing and creative personnel as regional options were significantly more cost-effective and more efficient. Additionally, strained communication between central [French] teams and regional leadership further exacerbated the resistance toward adopting centralized services, complicating management and coordination efforts.

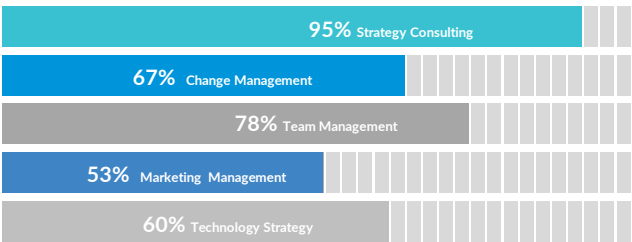
SOLUTION / APPROACH:

- Stakeholder Engagement & Management: I led discussions to understand the real problem, ensuring alignment with strategic initiatives.
- Cost-Benefit Analysis: I modeled the current-state and possible future state (solution) to advocate for business cases.

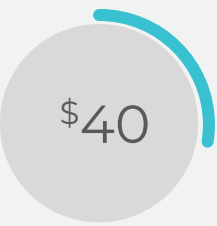
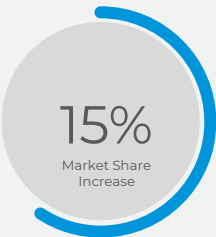
Solutioning:

1. I altered the existing Shared Services model to enhance operational excellence.
2. I re-created the governance model to improve oversight and control.
3. I published guidelines and a playbook to standardize processes.
4. I deployed a human and organizational change management plan to ensure seamless adoption and integration.

SERVICES MIX :



Results:



95%

Executive Buy-in

CASE STUDY: NVA (National Veterinary Association)

I devised a data management overhaul to address post-acquisition integration challenges for NVA amid a rapid 200+% growth. My objective was to unify disparate business, performance, and financial data to deliver decision-making insights, oversight, and clarity back to the enterprise. My strategy focused on streamlining NVA data processes, implementing governance, developing performance dashboards, and deploying the right tools and architecture.

SITUATION:

I was asked to help NVA regain control of its data, processes, and reporting practice after a rapid acquisition expansion plan. Having placed primary focus on growth, NVA lost control of all business processes, data, and governance—including internal revenue controls.

COMPLICATION:

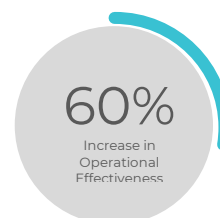
- Operational inefficiencies; disjointed data; increasingly complex architecture.
- Ongoing acquisitions with no post-integration processes
- No store count (basic data was missing)
- Disjointed applications

PROBLEM STATEMENT / ISSUE TO BE SOLVED:

With rapid expansion plan underway and an already 200% growth via acquisitions, how can NVA efficiently integrate and analyze disparate business, customer, and performance data to enable coherent enterprise-wide performance data?

SOLUTION / APPROACH:

1. Created a modern Master Data Management strategy
2. Integrated business process and technology discovery into a post-integration process
3. Created new organizational design, change management plan, and governance structures
4. Created and deployed modern architecture



89%
Increase in
Maturity

- ☒ Strategy Design
- ☒ Business Transformation
- ☒ Technology Strategy
- ☒ Post Acquisition Process Design

- ☒ Data Governance and Process Design
- ☒ Technical Architecture
- ☒ Strategic Partnerships
- ☒ Data Science

CASE STUDY: Nike

10

Nike, one of the largest and most recognizable athletic brands in the world, needed to modernize its marketing and branding practice. The project aimed to elevate the digital and physical interactions with its influencers and athletes globally. I evaluated current practices and procedures; leveraging insights from athletes, their managers, and influencers; developed a comprehensive marketing strategy; and suggested tools, architectures, and organizational design to help enable the strategy.

SITUATION:

Nike is known as a Marketing Powerhouse and as such has access to the most modern tools, processes, and techniques. However, holistic integration of those tools, processes, and personnel were not strategically aligned to a common goal.

COMPLICATION:

- Expansive technical architecture with multiple [siloes] functional departments.
- Technical data integration, but no interdepartmental integration
- Lack of willingness to change

PROBLEM STATEMENT / ISSUE TO BE SOLVED:

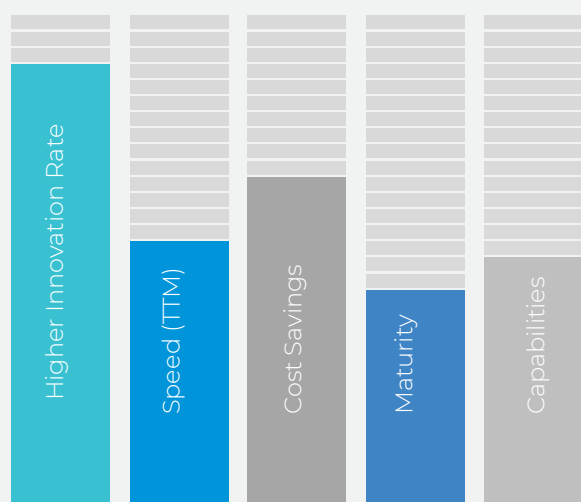
How can Nike create a new Marketing Engagement and Management Strategy for its athletes and influencers to streamline and manage interactions; enhance digital maturity, oversight, and performance measures; and streamline operations while also aligning with its objective to modernize, innovate, lower costs, and compete?

CHALLENGE:

- Model Transformation: shift from traditional marketing to a product-based design
- Active Engagement of Athletes and Influencers is low
- Doubling of current marketing costs despite transformative efforts
- Low executive-stakeholder engagement with wavering support
- High-visibility, high-cost (perceived), low budget

APPROACH:

- Strong technical architecture design focusing on AI, Automation, ML, and replication
- Human Change Management to change the perception of Marketing, influencers, and athlete sponsors from cost to sales agents
- Create a Modern Customer Athlete Engagement strategy
- Leverage Nike name in partnership engagements



Artie, VP Marketing
Nike, Inc.

"We ARE a marketing powerhouse—technology, process, practice...the strategy, insights, and transformations that Max suggested will make us stronger!"

CASE STUDY: VMware

11

I was tasked with devising a strategic approach to revolutionize customer engagement and support for one of the world's largest cloud technology providers, VMware. This project aimed to navigate the client through an ambitious journey of adopting a Modern Support Model (MSM), enhancing Customer Success Measurement, and elevating the Customer Experience (CX) across its vast ecosystem.



PROBLEM STATEMENT / ISSUE TO BE SOLVED:

How can VMware transform its current state operations into a more modern, proactive, and predictive customer engagement experience, ensuring unparalleled satisfaction and loyalty to maintain and increase its competitive edge?

CHALLENGE:

- Lack of customer centric focus
- Disconnected customer data across organization (technically and operationally)
- Organizational disconnect in customer-centric views

APPROACH:

- Customer interviews (150 engineers and C-level decision makers)
- Cognitive [Human] change management around the Customer
- In-depth competitor analysis and competitor capabilities analysis
- Centralize customer data

SOLUTION:

- Created a tailored Customer Success approach and strategy
- Re-defined the VMware customer and re-introduced the VMware customer
- Created a strategy to unify all customer data; bridge and exceed competitor and VMware

RESULTS:

- Increased Customer Satisfaction by 30% (Modern Support Model)
- 40% improvement in support efficiency (from customer stand-point)
- 35% improvement in staff commitment to customer success

\$50M

Savings from AI & ML

5%

Increase in Revenue

5point

Increase in
Competitive Matrix
Score



Higher ranking in
Gartner and G2
competitive
matrix score!!!

I led Toyota, the largest auto and auto financial services corporation in the world, to reimagine, and ultimately redesign, their entire marketing practice, capabilities, technology, and processes to become significantly more effective, efficient, and impactful while lowering internal operational costs, decluttering their technical architecture, and democratizing their customer data through the deployment of Salesforce across the enterprise.

PROBLEM STATEMENT / ISSUE TO BE SOLVED:

How can Toyota reimagine its processes, practice, technology, integration, and data utilization to enhance customer-centricity, loyalty, marketing activities, sales, and operations, to drive profitability while lowering costs?

- Challenges:
- Various business units operated independently without a unified strategy, leading to inefficiencies, lack of direction, and in effective results.
 - Each business unit had different levels of digital and operational maturity, which created inconsistencies in process execution and customer experience.
 - The company's marketing communications and technology were disjointed, leading to a cluttered technical environment and underutilization of available tools.

- Solution:
- I created a unified Strategic Framework: Implement a company-wide strategic framework that aligns all business units with the corporate vision, enhancing cooperation and reducing inefficiencies.
 - I Integrated MarCom/MarTech Systems: Create a unified MarCom/MarTech ecosystem that leverages existing tools and technologies across all business units, streamlining the technical environment, and maximizing tool utility.
 - I centralized Data Management: Establish a central data repository to ensure a unified view of the customer, facilitating better data sharing and actioning across the organization.

- Results:
- Reduce technology-related costs by an estimated 10-15%
 - Increase employee productivity by 15-20%
 - Reduce the operational process cycle time by 20-35%, leading to faster response times and improved agility in decision-making.
 - Improved customer experiences and enhanced value delivery may result in a customer retention rate increase of up to 8%, reducing churn and fostering brand loyalty.

Recommended
SALESFORCE

↓ Costs ↑ Productivity

10 – 15%

Lower Operational
Cost

8%

Increase in Marketing
Power

CASE STUDY: Mister Carwash

13

I embarked on a business and digital transformation journey for the nation's largest car wash company, Mister Car Wash. The company was looking to increase revenue, modernize, unify, and extend its market and capabilities. I developed a subscription strategy for growth and retention, enabled modern digital capabilities, and implemented a novel customer experience strategy.

PROBLEM STATEMENT / ISSUE TO BE SOLVED:



How can Mister Carwash gain more customers, revenue, modernize its old digital ecosystem, and gain a strong competitive positioning? How can it transform its current business to enhance and accelerate its customer engagement, streamline its operations, and drive growth while [simultaneously] increasing market share, lower costs, and expanding its national footprint?

- ✓ Business Transformation
- ✓ MarCom and MarTech
- ✓ Strategic Partnerships
- ✓ Change Management & Training
- ✓ Technology Evaluation
- ✓ Strategy design and

SITUATION & CHALLENGES:

- Antiquated tools, systems, and architecture
- Inadequate sales process and tools
- Multiple systems integration, custom tool design and development, and management of legacy relationships
- Multiple concurrent work-streams in need of tight integration

APPROACH:

5. Enterprise-wide digital transformation and modernization
6. Modern technology and architectural design
7. Merger of MarCom, MarTech, and Sales capabilities

1. Business model transformation
2. Technology evaluation and selection analysis
3. Subscription model design
4. Strategy design and deployment

RESULTS:



Increased Market Leadership position!

20%

Increased in new customer acquisition



Increased Marketing & sales capabilities

40%

CASE STUDY: Belcorp

14

Belcorp is a leading beauty multinational in Latin America celebrated for empowering women through its vast array of cosmetics, hair, fragrance, and personal care products (for both men and women). With a heritage spanning five decades and a presence in over 15 countries, the company is acclaimed for its innovative direct sales approach, nurturing entrepreneurial spirit, and commitment to enhancing the beauty and lives of its customers.



PROBLEM STATEMENT / ISSUE TO BE SOLVED:

In the wake of COVID-19, how can Belcorp change its direct-sell (door-to-door) sales model and transform its current business model into one that can survive and thrive during and beyond COVID?

CHALLENGE:

- Strong, 5 decade-long, direct sales model
- Lack of consistent processes and procedures across the Enterprise
- Lack of consistent regional human resources
- Agressive time frame

APPROACH:

- Digitally enable the sales process while keeping the human touch
- Extensive, multi-lingual training and behavioral change management
- Enterprise-wide business transformation and strategic shift

SOLUTION:

- Move to a digital first model with video conferencing and true color capabilities
- Reorganization and rapid Upskilling of current resources
- Technology modernization
- Strategic partnership and human resources design

RESULTS:

- Success!!! Belcorp not only survived COVID, but also increased its revenue
- Increased revenue from \$3B to 5.5B
- 50% organizational change with 90% retention and 80% successful upskilling

25%

increased sales

46%

Improvement in
product delivery
time

90%

increase in revenue
over 2 years

- ✓ Business model design, change, and transformation
- ✓ Change Management, Organizational Design, Training development

RECOMMENDATIONS



"From my experience with Max, not only did he focus on a long-term strategic view, but he also looked at a shorter horizon to see how he could add value to the company by improving process efficiency, cutting costs, saving time, reducing risk and/or increasing quality. He was also very effective in the implementation of the strategies created and did a great job managing the resulting change within the organization."

Ken Machline, MBA, PMP, SCM
New York Life, Business Operation



"Sometimes you just find the right consulting firm and the right consultants. I found that with Max. I had the honor of working for him while at Photon; so when I say I would recommend him, I am saying so wholeheartedly and from first-hand experience. I RECOMMEND MAX—for anything and everything: any industry, vertical, position, or role. I have seen him lead Fortune 500 companies to success and bootstrapped startups out of a pinch. If he doesn't know something, he is humble enough to ask and to learn it. I have never seen someone so committed toward ensuring his customers, colleagues, and management were successful and capable."

Chevella Kelley
Transformation Lead,
Morgan Wendellman



"I have known Max for almost a decade now. I worked with them at Estee Lauder while he managed a \$550 million transformation that was going horribly wrong. He led his team to changed that. When he asked me to write a recommendation for him and his company, I remembered why I recommended him directly to the CEO of Festo—because he gets things done and does it right. I will continue recommending him and his company simply because so few can do what he does: oversee large transformations—gracefully and with everyone on board."

Andrea Ziomek
Partner, Altix



PM Principle IS action. The output is incredible. Insightful, complete, and 100% actionable. They think of their customers first. You can feel it, you can smell it, and your bottom line will show it.

Edward Kleban
Director of Marketing
Transformation, Accenture
Song

RESUME

Max Patel, MBA, MA, PMP



Education: Harvard Masters, MBA



Contact: 646-926-7047 max@pmprinciple.com

Dynamic and results-driven senior executive with over 20 years of experience driving innovation and business outcomes across diverse sectors. Proven expertise in leading global marketing transformations, IT modernizations, and strategic initiatives. Adept at managing creative teams, cross-functional and global teams, fostering strategic partnerships, and aligning marketing messaging to user needs to generate actionable outcomes. Willing to travel extensively to meet business needs.

CORE EXPERTISE

Strategic Leadership	Digital Marketing	Networking
Communication	CRM	R&D
Problem-solving	Financial Analysis	Sales Strategy
Team Collaboration	Agile Methodologies	Supply Chain Management
Project Management	AI & Machine Learning	HR Management
Data Analysis	Cybersecurity	Content Creation
Strategic Planning	Cloud Computing	SEO Optimization
Customer Insights	Business Development	Social Media Strategy
Market Research	UX Design	Innovation & Creativity
Customer Engagement	Software Development	Emotional Intelligence

WORK HISTORY & ACCOMPLISHMENTS

PM Principle, New York, NY

Managing Partner (June 2023 - Present)

- Led the transition and sale of PM Principle to a consortium of companies, expanding service offerings, aligning and leading marketing and communications strategies, and increasing client project efficiency by 25%.
- Developed and implemented a marketing campaigns strategy, maintaining a 98% client satisfaction rate during the transition, a 15% increase in hit rates, and a 20% increase in digital marketing capabilities.

Consortia Companies, Tampa, FL & Baltimore, MD

Sales and Post-Merger Integration Lead of PM Principle (January 2023)

- Generated \$2.2M in revenue by leading a team of three strategists and analysts in developing a customer success model and digital transformation strategy for a mid-sized global company.
- Negotiated and executed the sale of PM Principle to Consortia Companies, resulting in a 30% expansion of service offerings, a projected 25% increase in client project efficiency, and alignment of creative efforts with strategic objectives.
- Spearheaded the transition and integration of services into the Consortia consortium, achieving a 95% retention rate of existing clients and ensuring seamless operational continuity.

Confidential Consulting Firm, New York, NY

US Principal and Director (January 2023)

- Generated \$22.3M in revenue by leading a team of 15 principal strategists, analysts, and international creative resources for a start-up.
- Increased brand recognition and engagement by 65% through strategic sales and media campaigns.
- Developed and implemented a communication strategy, maintaining a 98% satisfaction rate and ensuring transparency and alignment.
- Led and introduced MarTech strategies and digital enablement tools such as Marketo, Salesforce, and SIA.

Photon Infotech, New York, NY

Principal Global Strategy Consultant and Director (January 2019 - June 2023)

- Reduced operational costs by over \$10M and increased regional sales revenue by \$40M through strategic initiatives.
- Led a \$1.55M project team, delivering a 5% market share increase through digital innovation, MarTech enhancements, and creative leadership.
- Led, groomed, and up-skilled 6 direct reports.
- Served as a subject matter expert in the areas of Luxury Retail, Beauty, Commerce, Manufacturing, and AdTech & Media.

➤ **LVMH, Dubai, Paris, and London**

Principal, Global Corporate Strategy & Management Consultant (2023)

- Reduced internal operational costs by over \$10M and increased regional sales revenue by \$40M in six months by designing and rolling out a 'Globalization through Regionalization' strategy; re-thinking e-commerce strategies, and utilizing data to drive automation.
- Delivered a 5% market share increase by leading a \$1.55M project team focused on improving cross-regional technical collaboration.
- Utilized data-driven insights to identify growth opportunities and optimize resource allocation, fostering a culture of continuous improvement and innovation.

➤ **NVA (National Veterinary Association), Pittsburgh, PA**

Senior Director and Principal, Technology Strategist (2023)

- Raised enterprise efficiency by 250% and operational efficacy by 60% through transforming and deploying a comprehensive Master Data Management strategy.
- Spearheaded the modernization of NVA's data management technology, significantly reducing analytics times by 67% and performance reporting delays by 90%.

➤ **Nike, Beaverton, OR**

Senior Director and Principal, MarTech and Marketing Strategist (2022)

- Augmented technical capabilities of marketing by 35% and reduced influencer management process by 40% through technology automation and lean process redesign.
- Projected a 5% revenue increase by streamlining marketing technology operations and generating better business outcomes.

➤ **VMware, New York, NY**

Senior Director and Principal, Marketing and Customer Success Advisor (2022)

- Heightened AI operational support by 40% and improved customer retention by 32% through rolling out a customer success initiative focused on optimizing operational efficiency and market positioning.
- Forecasted \$50M in cost savings by implementing an advanced ML/AI strategy, driving innovation, and strengthening the competitive edge in the technology sector.

➤ **Allstate Insurance Company, Northbrook, IL**

Senior Director and Principal, HR and Strategy Consultant (2022)

- Created and led HR Talent transformation strategy.
- Decreased time-to-hire by 27% and improved talent retention by 32% through revamping recruitment and retention processes.
- Boosted overall talent management productivity by 40% through proposing and rolling out technical solutions for HR processes.

➤ **Under Armour, Baltimore, MD**

Senior Director and Principal, Technology Strategy Consultant/Program Lead (2021)

- Improved scalability and operational efficiency, boosting brand amplification by 20-30% through managing internal and external teams to re-architect digital apps and technical resources.

- **Toyota Financial Services, TX**
MarTech Strategy Consultant and Advisor (2021)
 - Created a transformation strategy to modernize and integrate sales, communications, and marketing functions, increasing customer outreach and reducing costs through deployment of Salesforce across the enterprise.
- **Mister Carwash, AZ**
Principal Business and Retail Technology Strategy Consultant
 - Pioneered a Retail Customer Subscription strategy, significantly enhancing customer engagement and retention.
- **Belcorp, Miami**
Principal Transformation Strategist & Advisor (2020)
 - Created a rapid-results enterprise-wide business transformation strategy, transitioning the company from a direct sales model to a technology-led digital-first model.
- **J.P. Morgan Chase and Company, New York**
Principal IT Strategy Consultant (2020)
 - Optimized enterprise strategic program alignment by 60% and operational efficiency by 30% through the development of a customized cloud migration strategy.
- **PVH, New York**
Principal Strategy Consultant & Program Manager (2019)
 - Generated \$145M in additional revenue while saving \$33M in e-commerce operations by taking over and turning around a failing program from Deloitte and BCG.

Festo, New Jersey, Quebec, Germany

Chief of Staff & Head of Strategy (January 2016 - November 2018)

- Introduced strategic frameworks and performance measures, securing \$42M in revenue through the discovery of a new market segment.
- Oversaw and realigned marketing, finance, procurement, strategic partnerships, innovation and new product design, and e-commerce to supersede corporate objectives.

New York and Company, New York, NY

Senior Executive Director, EPMO and Strategy, Interim VP of Business Analytics and Data (January 2015 - December 2015)

- Boosted operational efficiency by 48% through a company-wide reorganization and digital strategy implementation
- Developed and implemented revised marketing and e-commerce strategies; created a customer rewards program; and re-organized marketing and creative functions generating a 38% increase in sales (on-line).

CTS Partners (for Estee Lauder Companies), New York

Senior Strategy Consultant (January 2008 - November 2014)

- Increased online revenue by 22% through business and strategy development in e-commerce, sales, communication, transformation, and change management.
- Led \$550M global modernization initiative which included oversight and direct responsibility for SAP implementation.
- Created [Enterprise] PMO and EPMO departments and capabilities
- Created 1, 3, and 5 year global strategy for Global Corporate Communication, [Direct and Indirect] Procurement, and Global Information Services [IT]

Magnetic Corporation, Tampa, FL

Senior Program Manager (2007 - 2008)

- Introduced project management, scoping, and budgeting processes, resulting in sizable cost savings and improved project delivery.
- Successfully managed high-net worth clients, partnerships, and relationships cumulatively totaling over \$14M.
- Oversaw Project Management department with overseeing 4 direct reports.
- Successfully served as the primary engagement manager between customer and agency.

Bayshore Solutions, St. Petersburg, FL

Senior Project and Program Lead (2005 - 2007)

- Successfully managed multiple concurrent projects and high-dollar value client relationships.
- Served as the primary marketing and media subject matter expert for performance data, analytics, and customer information.
- Managed customer and agency inner communications by servicing as a relationship manager connecting digital, creative, and development to customer needs and outcomes.

EMS Technologies, Clearwater, FL

Project Manager (2003 - 2005)

- Created and delivered a new training product offering, resulting in over \$200K of profit in the first three months.
- Oversaw and led Remedy, ITIL, development processes, and training processes.
- Successfully led multiple US Government (Federal) relationships, projects, and programs including the Remedy installation for MacDill Air Force Base.

T. Rowe Price, Tampa, FL

Project Manager (1999 - 2003)

- Managed site-wide implementation and transition to post 9/11 US Patriot Act, KYC, and AML programs and initiatives.
- Oversaw and performed trade related operational compliance; training; systems; and communications.
- Series 6, 63, 7, and 21 certified (now expired).

EDUCATION

- Master of Industrial Organizational Psychology, Harvard University (2023)
- MBA, University of South Florida
- Master's Certificates in Mergers and Acquisitions (Cornell) and Strategic Business Management (Harvard)
- Bachelor's Degree in International Studies, Government, and International Affairs, University of South Florida

ADDITIONAL SKILLS & CAPABILITIES

- | | | |
|----------------------------------|---------------------------------|-----------------------------------|
| • Strategic Leadership | • Supply Chain Management | • Budgeting |
| • Business Consulting | • Customer Experience | • Financial Planning |
| • Retail Industry Expertise | • Digital Transformation | • Digital Innovation |
| • Client Relationship Management | • Merchandising | • Emerging Technologies in Retail |
| • Revenue Growth | • Executive-level Communication | • E-commerce |
| • Business Transformation | • Financial Acumen | • Data Analytics |
| • Team Building and Leadership | • P&L Management | • Thought Leadership |
| • Marketo | • Strategic Thinking | • Project Management |
| | • Problem-solving | • Risk Management |
| | • People Management | • Quality Assurance |
| | | • Salesforce |

