
STAFF POSITIONS

8/2006-11/2011 EBG SYSTEMS, INC. Chicago, IL

Vice President of Sales & Marketing

- Supervised two staff members plus varying numbers of US-based and offshore contractors. Employed a team management approach which recognized the best ideas, and encouraged junior staff to succeed and grow.
- Managed the C-Level sales pipeline for three .NET (dot-net)/SQL cloud-based financial industry software products (two sales proposal systems and a workflow management platform). Sales generated setup fees of up to \$20,000 and ongoing yearly revenue from \$500 to \$20,000. The 1-20 month process, from initial software demonstration through close, was on an inside basis 90% of the time. Roughly \$110,000/year in first-time transactions. Roughly \$10,000/year in past-due collections. 70-100 transactions/year. Annual gross went from about \$250,000 to \$680,000.
- Created a 5,000 item prospect database in ACT through hand data entry and maintained the database by adding new records, updating existing records, and removing records of contacts who requested no further communication. This project centralized hard copy lists collected from various sources over the previous several years.
- Created HTML mass advertising emails and monitored dissemination through High Impact Email. Analytics were used to monitor video clicks, etc. Methods complied with the CAN-SPAM Act. Tested content through common systems, such as Outlook and Gmail, for compatibility prior to sending. Achieved up to a 2.5% response rate.
- Set product pricing levels and managed invoicing/credit card payment gateway through QuickBooks Online. Wrote standard product service agreements and altered with custom language as necessary according to specific client requirements. Monitored ROI. Periodically shopped our merchant account to insure competitive rates.
- Represented our firm by manning a booth at industry trade shows, such as the ASPPA Annual Conference.
- Recorded feature requests from prospects and clients in an Elementool database, which was used to guide software development decisions. Led software development meetings to balance the needs of prospects and clients.
- Developed brand-consistent collateral: flyers, posters, mouse pads, business cards, banner stands, brochures and the company web site. Installed analytics on the company web site and used this tool to assess impact of content changes.
- Served as point service contact on large accounts such as Merrill Lynch, Standard Insurance, and John Hancock
- Developed Search Engine Optimization (SEO) for the company web site and coordinated it with social media outlets
- Monitored competitor activity and assessed impact on our business plan
- Managed a series of four paid informational webcasts on the subject of qualified plan design. These webcasts were given to market our software products and as a source of ancillary income. Total gross revenue was roughly \$60,000.
- Organized yearly software user group meeting including location, Power Point presentations, and contests with prizes.

9/2004-6/2006 PRIZM FINANCIAL ADVISORS, INC. Wheaton, IL

Qualified Plan Program Manager

- Supervised one staff member and a varying number of US-based contractors
- Brought in new clients. Sales generated anywhere from \$500 to \$7,000 in yearly revenue. 90% outside, three-twelve month process. Took yearly benefit plan gross from \$17,000 to \$45,000 and assets under management from \$3.5 to \$14.5 million.
- Made cold-calls to develop the pipeline of new C-Level leads. On an average day I would make twenty-thirty calls.
- Developed referral relationships with health insurance brokers, CPAs, banks and other entities through networking
- Designed a PRIZM brand-consistent qualified plan web site and companion high-quality hard copy brochure
- In conjunction with a specialized attorney, wrote proprietary investment policy statements for client adoption (this legal document formalizes decision-making rules and guidelines for a company's investment selection committee)
- Serviced existing client relationships (yearly account reviews, investment monitoring/recommendation, vendor service matters, and organization of multilingual employee education meetings across the country)
- Built a Microsoft Access database with label generator for fulfillment of monthly prospect mailings.

10/2001–9/2004 MIDWEST BANC HOLDINGS, INC. Elmwood Park, IL

Assistant to the President – Midwest Financial & Investment Services

- Branch Supervisory Duties: Reviewed and approved branch paperwork for new accounts and higher-level account authorization (Example: options or margin trading), conducted satellite broker audits for compliance with broker/dealer rules (Example: were the investments being sold by the broker in accordance with stated client risk tolerance? Has all appropriate paperwork been completed for each account? Are annuity policies being delivered?)
- Designed/supported an Excel database with pivot tables, macros, conditional formatting and many linked worksheets. It tracked per branch sales referrals from banking to investment divisions, and was rolled out to twenty branches.
- In-house tax work for premium wealthy individual clients: attended the H&R Block tax preparation course as well as financial/managerial/partnership & trust accounting courses at Oakton College in Des Plaines, IL. \$4,500/year gross.
- Made cold calls to set appointments with potential clients. During tax season this was limited. Outside of tax season a typical day involved 40 – 150 calls. Cross-sold and passed leads to the retail banking division when appropriate. One such lead yielded a commercial new construction loan on which the bank made roughly \$90,000.
- Went out on sales appointments, alone or with another representative. Sales generated \$1,000 to \$12,000 in one-time fees and \$1,000-\$5,000 in ongoing yearly revenue. Three-twelve month close time. Three-six transactions per year.
- Serviced existing client relationships (yearly account reviews, investment monitoring/recommendation, vendor service matters, and organizing employee education meetings for English, Spanish and Polish participants).
- Occasionally was a substitute presenter on WJGG AM's afternoon stock market report, which our company presented daily.

POST-COLLEGE TEMPORARY POSITIONS

6/1998 – 10/2001 – GE Capital Trans Leasing collections agent, GE Capital Trans Leasing contracts analyst, accounting and statistical compilation at Chicago Botanic Garden, internal audit worker on an asset-backed securities portfolio at Heller Financial, Salomon Smith Barney brokerage assistant, Credit Suisse First Boston brokerage assistant, software tester for new transportation system at Bank One, Morgan Stanley telemarketer, Horwitz & Associates brokerage assistant, secret shopper for Grossinger Auto Group, telemarketer for Expo 2000 Contracting, Marketplace: Handwork of India customer service agent and Maurice Sporting Goods returns analyst – All of the above were in the Chicago Metropolitan Area. Most were secured through agencies such as Olsten and Adecco, the remainder through classifieds.

EDUCATION

6/1998 University of Illinois Champaign-Urbana, IL

- Bachelor of Science – Psychology – Industrial/Engineering concentrations

Course of study concerned how business people relate to technology systems, the physical environment and each other.

RELEVANT COLLEGE WORK EXPERIENCE

5/1997– 9/1997 Starbucks Corporation Shift Supervisor Evanston, IL

- Promoted after two summers as a line employee. This experience taught me to: handle responsibility for money, staff and physical plant, navigate unexpected situations, set up marketing displays, file daily reports with the District Manager, prepare bank deposits and credit card batches, conduct business with the local bank branch, and that team-based management is most successful. Crew sizes were three-six. A big part of this job was also maintaining relationships with regular customers.

SELECTED CHICAGO AREA COMMUNITY WORK

5/2003-5/2009 The Chicago Academy for the Arts

- Member of the Board of Trustees, Chair of the Alumni Affairs Committee (the committee at various times had 3-6 members)

3/2006-3/2008 Evanston Recreation Department Annual March Madness Youth 3-on-3 Tournament

- Volunteer score keeper

5/1996-9/1996 Uptown Habitat for Humanity

- Assisted the Volunteer Coordinator in managing maintenance and renovation projects across Chicago

NOTES

Possess Valid U.S. Passport

Beginning Spanish proficiency