

Main skills/experience Areas:

- Strong experience in senior IT and Finance management
- Long history of operational analysis and improvement initiatives
- Ability to quickly learn and assess business environments, for identification of key/core business issues
- Plan development, consensus building, change management, and training initiatives
- Communications—verbal and written, training, selling, coaching
- Technology research, assessment, and planning (CTO level)
- Executive-to-executive selling and relationship building (especially CIO's and CFOs)
- Operational management scope highlights:
 - Largest P/L responsibility: \$37M
 - Largest cost budget responsibility: \$40M
 - Largest headcount responsibility: 250

Experience:

2002 - 2020. [GATX/CIT/Macquarie/Huntington Bank](#) (Tampa FL, Bloomfield Hills MI). This 18-year period was with essentially the same organization, which was acquired three times (hence the name changes). The position in this period essentially stayed the same, but increasingly required efforts to formalize (and improve) the selling processes and create alternative pathways to engage with partners and clients.

In all cases, the role required quick analysis of client needs, processes and situation, and then design of possible process modifications to incorporate alternative finance—to realize forecasted benefits. In very large opportunities, extremely detailed analysis of the current state – and documentation of the impact of process quality failures—was required in order to build a transition plan and executive presentation.

Chief Technology Officer--Research and Strategy Services, Huntington Technology Finance / Huntington Bank, reported to EVP of Sales, 2015 to Jan 2020. (Bloomfield Hills MI).

This was a continuation of the roles at CIT/GATX/MEF, but required a full re-vamp of the sales processes, training programs, and creation of unique analytical sales tools. Access to prospects became an acute problem in the technology industry, and this required an innovative approach and creation of new outreach programs to VARs and bank partners. Some of the new CFO tools were not deployed due to the sudden reduction-in-force by the parent bank, responding to the 2019 financial crisis.

Responsibilities:

- Create business innovation and processes, designed for sales process improvement

Initiatives:

- Create completely new, unique, go-to-market sales process, with specific differentiation factors, automated outreach tools, and numerous 'get a meeting' tools/tactics.
- Develop full-scope training materials for field reps. Train and educate field sales and corporate marketing on new sales processes and tools.
- Build, refine, formalize, and document a sales support function, for performing market research, target account identification, and customized OUTREACH deliverables.
- Provide competitive analysis and design competitive offerings for executive management.

Results:

- Created market-unique semi-automated client-facing analysis tools to help educate clients on benefits of alternative finance. Included detailed financial forecasting models, state transition plans, and suggested timelines.
- Created full-blown outreach sales process, with flowcharts, templates, talk-tracks. Multiple 'get-a-meeting' processes and tools were developed. Trained reps one-on-one in the field, at their location.
- Tools were widely used by sales team and appreciated by client CFO's and VAR partners.
- Several of the more detailed client engagements were 'templated' into standard service offerings.

VP Research and Strategy Services, Macquarie Equipment Finance, reported to EVP of Sales, 2008 to 2014. (Bloomfield Hills MI).

This was a continuation of the roles at CIT/GATX, but now with international support requirements, greater internal support to executive management (e.g., on trends in the marketplace), greater training requirements to address the growing process complexity of ITAM in their customers, and increased development of educational tools concerning the upcoming FASB/IASB changes.

Responsibilities:

- Create business innovation and processes, designed for sales process improvement

Initiatives:

- Ramped up production of educational content on our website for clients.
- Begin writing more material on asset management (ITAM) and anticipated FASB/IASB accounting changes.
- Provide support for international Macquarie locations.
- Increased number of customer calls, to both gather information about current and upcoming corporate issues as well as to educate them on financing alternatives, benefits, and processes

Results:

- International travel to support overseas opportunities.
- Tools were widely used by sales team and appreciated by client CFOs.

VP Strategic Advisory Services, CIT, reported to EVP of Sales, 2004 to 2007 (Bloomfield Hills MI).

This was a continuation of the role at GATX, but with much more time spent on client-facing communications, with increasing client engagement (for analysis and recommendations), and with an expansion of focus to include new governance issues and upcoming regulatory changes.

Responsibilities:

- Create business innovation and processes, designed for sales process improvement

Initiatives:

- Ramped up production of educational video content and created a website of these for clients.
- Begin writing more material on Risk management and possible FASB accounting changes.
- Increased number of customer calls, to both gather information about current corporate issues as well as to educate them on financing alternatives, benefits, and processes.

Results:

- Created market-unique website for clients – with solid, impartial analysis of trends
- Tools were widely used by sales team and appreciated by client CFO's and CIOs.

VP Technology, GATX, reported to outgoing CTO, 2002 to 2004 (Tampa FL).

(I was new to the technology leasing industry, but quickly recognized its value, and began producing written materials and videos, attempting to educate others on this.)

Responsibilities:

- Assist CTO and operational staff in creating improvements in sales outcomes.

Initiatives:

- Created a market-unique customer deliverable – a quarterly 400page binder of technology trends and forecasts
- Created a series of White Papers on customer IT/Finance issues, educating both clients and the sales team on important issues and process implications.
- Created talk-tracks on handling objections to leasing services.
- Participated in a large number of client meetings and seminars, offering analysis and advice on IT decisions.

Results:

- These tools were well received by clients, the sales team, and vendor-partners. They were fairly unique at the time.
- The binder of tech trends was an absolute differentiator for the sales team.

1999 – 2002. Private Practice, Management and Research Support (CA, MS). This period was focused on project-work, in areas of plan development, marketing design, technology research, executive video training, sales training, and financial services, for multiple clients. Clients were from industry sectors of leasing, international communications/networking, middleware products, application servers, venture capital, systems integration, and broadcast media.

Activities/Results:

- Created/delivered an 8-hour seminar to CIOs on *Change Management Issues and Tactics*, for *CIO Magazine* in Australia.
- Was acting CFO for 9 months for international portal and networking services company
- Created video training series on organizational dynamics for CIOs (recommended by *CIO Magazine*)
- Provided executive sales training to advanced reps for a national systems integrator
- Produced 200-plus pages of technology assessments/analysis (for leasing client)
- Led the marketing strategy formation group for middleware company
- Researched/created technology presentations for clients' *internal* use (e.g., venture capital firm)
- Created LOB marketing white paper for application server client, widely used by field sales force
- Performed technical feasibility study for broadcast media start-up
- Spoke at IT/CIO industry events (US /Australia) and had two articles published in *CIO Magazine*

1986 - 1998. AmeriSource/BusinessLand/JWP/Entex (Shreveport, San Jose, Ryebrook NY, Cincinnati). This 12-year period was with the same organization, which was acquired three times (hence the name changes). The positions in this period varied widely, but always included, customer-facing activity and technology initiatives for internal use.

Vice President, Strategic Development, ENTEX Information Services, reported to EVP, Oct 1996 to Nov 1998.

Responsibilities:

- Create business innovation and processes, designed for growth within existing accounts

Initiatives:

- Developed sophisticated account planning processes for top 100 accounts
- Developed nationwide customer satisfaction feedback program
- Implemented sales forecast 'pipeline' process
- Designed and implemented a TCO (Total Cost of Ownership) workshop for CIO's
- Developed advanced sales training process for all sales personnel

Results:

- 94 account teams built strategic plans for top 94 accounts (approximately \$1.2B)
- Sales forecast system upgraded and rolled-out in 8 weeks
- Over 450 sales personnel trained during course of program (47 classes)
- Held TCO workshop in 10 cities, with over 3,000 high-level attendees

Division Vice President, Entex University, ENTEX Information Services, reported to SVP, Jul 1994 to Nov 1996 (Cincinnati).

Responsibilities:

- Ensure labor force is prepared for strategic customer demand, by creating a national training facility and program
- Develop Internet vision and strategy for company
- Provide consulting assistance to customers on technology and management issues
- Direct reports: 8; Dotted-line organization: none; Budget: \$9M

Initiatives:

- Designed, planned, staffed, and managed ENTEX University in Cincinnati OH
- Created and implemented "Just in Time" sales training video training courses
- Developed 3-phase Internet Strategy: implemented first phase (home page)
- Presented CIO executive breakfasts on Windows 95 issues (1,200 attendees)
- Created vendor-funded co-certification programs (Microsoft, Novell, Compaq)
- Created individual training plans for each technical employee (2k+) and modified them on a quarterly basis

Results:

- Over 250 highest-level certifications granted in first year (and over 1,100 basic ones)
- Branch training process worked so well the field training budget was centralized under ENTEX University for the following year (\$14M)
- ENTEX University fully staffed, with 10-15 on-site classes being taught per week
- Personally built and launched ENTEX' Internet home page; generated over \$500K in revenue in first 4 months, featured in all major trade press.
- Spoke in front of over 4,200 people and published 10 articles on management in *Client-Server Computing*.

Division Vice President, Advanced Client Services, ENTEX Information Services, reported to EVP, Aug 1993 to Jul 1994 (San Jose/Ryebrook NY)

Responsibilities:

- Integrate Advanced Management Services group (management consulting) with Client Services group (technical consulting) and manage to success
- Minimize turnover and customer satisfaction issues during private buyout and financial crisis
- Grow sales of the advanced services business by 35%
- P/L responsibilities for 250+ technical personnel (overlay P/L)
- Direct reports: 15; Dotted-line organization: 250; Budget: \$3.7M

Initiatives:

- Integrated the AMS and CS groups organizationally
- Implemented national skills database
- Created national education event for morale and technical development
- Created communication vehicle for 'big wins'
- Developed standardized service offerings, for quality and ease of sales

Results:

- Held turnover to 26% in most difficult year
- Grew advanced service revenues 45%, from \$25M to \$37M
- Held profitability steady during high staffing growth
- Spoke in front of approximately 3,500 people

Vice President, Advanced Management Services, JWP Inc., reported to CEO, Sep 1991 to Aug 1993 (San Jose)

Responsibilities:

- Build/execute an Outsourcing business plan to produce \$15M revenue by 1993
- Represent JWP at industry events and customer briefings
- Develop management consulting offerings around strategic customer issues
- Direct reports: 12; Dotted-line organization: none; Budget: \$1.8M

Initiatives:

- Developed leading-edge customer *outsourcing planning model* for differentiation
- Built alliances with consulting groups
- Trained 70+ field salespeople on executive selling and positioning
- Built 400-page sales binder of supporting deliverables
- Built consulting/research group of 10-12 people

Results:

- Started 50+ sales cycles by August 1992
- Closed 4 accounts with revenues of \$1.5M run-rate in first 90 days
- Grew on-site personnel from 220 to 550 (\$33M revenue, 3x target)
- Spoke in front of over 3,200 people in U.S., UK, France, Germany

Vice President, IBM Value Alliance, Businessland Inc., reported to President/COO, April 1991 to Sept 1991. (San Jose) (Short tenure due to acquisition of Businessland by JWP.)

Responsibilities:

- Build/execute marketing plans to grow IBM sales by 20%
- Manage IBM market development funds (approx. \$40M)
- Represent Businessland and IBM at industry events and customer briefings
- Direct reports: 3; Dotted-line organization: 15; Budget: \$41.5M

Initiatives:

- Developed customer deliverables that sold IBM values
- Developed team of 15+ field sales specialists
- Performed an Businessland-IBM Roadshow for customers/IBM
- Started sales efforts to IBM trading area execs.
- Set up special opportunity 'war room'

Results:

- Won several clone-contests with Focus bids
- Spoke in front of over 1,800 people in U.S., UK (in 6-month period)
- Missed revenue growth targets due to business crisis environment

Managing Director, Network Systems Division, Businessland Inc., reported to EVP, Nov 1990 to Mar 1991. (San Jose)

Responsibilities:

- Build/execute an advanced technology business plan to produce 1% NI in 1991
- Manage marketing communications department (during business crisis reorganization)
- Work with senior management in keeping field morale stable (business crisis)
- Perform competitor analysis
- Direct reports: 2; Dotted-line organization: 12; Budget: \$450K
- Represent Businessland at industry events and customer briefings

Initiatives:

- Used outside consultants to produce Imaging systems study
- Built business models for a services division
- Produced two videos and 3 white papers for customer/employee relations
- Designed and held oversight for our Technology Summit, Executive Briefings, and Client Council

Results:

- Produced business plan (no funding approved, due to business crisis)
- 400+ attendee Technology Summit (Edward Heath as keynoter)
- Reduced costs in marketing dept. by 20%
- Spoke in front of over 1,800 people in U.S., UK

Director, Business Development, Businessland Inc., reported to VP, Business Development, Dec 1989 to Nov 1990. (San Jose)

Responsibilities:

- Build/manage the 3-year strategic plan
- Perform internal operations reviews
- Build European business plan in preparation for selling international operations
- Perform competitor and industry analysis
- Build VAR capabilities
- Represent Businessland at industry events and customer briefings

Initiatives:

- Worked with executive office to prepare plans
- Co-chaired Board-appointed task force to identify major weaknesses of the organization
- Participated in all strategic partner discussions; performed due diligence activities
- Worked on restructuring committee, to size and shape the business

Results:

- Identified process improvements in warranty handling, amounting to \$3M per year
- Produced business plans on time and to senior executive approval
- Created VAR channel for high-end products
- Spoke in front of over 2,000 people in U.S., UK

Director, Operations Improvement, Businessland Inc., reported to SVP Distribution, Oct 1988 to Dec 1989. (San Jose)

Responsibilities:

- Design/Install performance metrics for all departments
- Manage and transform 75-man IS department
- Plan/Implement systems replacements for inventory and distribution systems (budget of \$8M)
- Perform various operational turnaround assignments
- Perform capital budget reviews
- Represent Businessland at industry events and customer briefings
- Direct reports: 7; Dotted-line: 85; Budget: \$9.3M

Initiatives:

- Developed standard performance reports and metrics for all Operations departments
- Selected software packages, built product implementation team, and managed project completion
- Created forecasting processes
- Did capital proposal 'scrub downs' for \$14M in capital expenditures

Results:

- Changed IS management and raised performance to 99%
- Finished projects within budget and on time
- Reduced losses in Clearance operation by 50%
- Implemented first PC-based executive-information-system in company
- Spoke in front of over 3,000 people in U.S., UK

Director, Strategic Planning, Businessland Inc., reported to Vice-Chairman, Oct 1987 to Oct 1988. (San Jose)

Responsibilities:

- Assist Vice-Chairman in constructing the 3-year strategic plan
- Represent Businessland at industry events and customer briefings
- Perform advanced consulting for large accounts
- Take part in new product evaluation and positioning

Initiatives:

- Began the 'white paper' series for Businessland
- Worked with field consulting organization on customer presentations
- Consulted with Businessland's major vendors

Results:

- Produced 5 white papers, read by over 40% of our customers
- Spoke in front of over 1,500 people in U.S., UK

CPU Product Manager, Businessland Inc., reported to VP Marketing, Aug 1986 to Oct 1987. (San Jose)

Responsibilities:

- Manage product marketing efforts on IBM, COMPAQ, Wyse CPU lines
- Grow Wyse sales by 2.5x within a year
- Communicate the relative positioning of these products to field
- Produce competitive product analysis
- Represent Businessland at industry events and customer briefings

Initiatives:

- Taught every sales training class for 3 hours on selling strategies
- Produced 7 product positioning papers and slide shows

Results:

- Wyse sales on track for mandated growth, at time of promotion
- Created reporting system for market research and trend analysis
- Spoke in front of over 1,000 people in U.S.

Business Systems Consultant, Businessland/Amerisource, reported to Branch Manager, March 1985 to August 1986. (Shreveport, LA.)

Responsibilities:

- Advanced technology sales to large-accounts
- Briefing/training of other sales personnel on advanced technology products

Initiatives:

- Instituted customer-briefing tactics
- Did twice-monthly training for other personnel on Unix, LAN's, System36

Results:

- Achieved 125% of quota
- Elected to President's Club
- Helped raise gross margins in the branch by 2%, due to advanced technology sales

1983 - 1985. The Catalyst Group (Dallas TX, Shreveport LA). This was a small 5-7 person consulting start-up, specializing in applying the new micro-technologies in the commercial sector. The process involved quick and accurate assessment of a customer's current state/situation, and then design and assessment of improvement initiatives to that—incorporating the new technologies. As founder and fund-er, the position had full management responsibility for the firm, including evaluating and selecting key strategic products for resale, consulting, and production of custom commercial-grade software systems (e.g., freight audit, hospitality, non-profit, real estate). The position required training a team of 5-7 consultants in these new technologies. The selling tactics revolved around seminar selling and consultative selling, with a lead stream generated by an outside telemarketing firm. Grew the business to two locations, in two cities, with a run rate of \$1.5M in first two years. Concurrently taught software engineering class at University of Texas at Arlington.

1973 - 1982. This period was focused on a traditional MIS/IT career path. It consisted of successive positions of increasing IT responsibility (GA, FL, TX), beginning with programming and culminating in senior IT management (MIS Director). All of the positions in this period involved mainframe and minicomputer technologies (IBM, DEC, Data General, Univac, NCR) and traditional software development (COBOL, Fortran, assembler, SPSS), but the senior IT position also involved transformation of a host-based environment into early pre-PC microcomputer LAN technologies, with high availability requirements (for an accounting service bureau). This senior position also allowed the experience of creating and selling OEM solutions, which created the motive for starting a consulting and software firm. Additionally, I undertook some outside project work on pre-PC technologies (e.g. Apple II, TRS-80, TI 990).

1968 - 1972. Project work during college. There were several small software and/or statistical projects that were paid projects or part of a financial aid package. These included statistical programming on a medical information device, statistical programming in Fortran on an IBM mainframe (effect of aerial droplet size on crop pest control), and statistical processing for a biomedical project. I was employed by GE as a computer programmer and data analyst for two summers, as a sub-contractor to NASA.

Education & Certifications:

Mississippi State University. B.S. in Computer Science [Business Statistics minor], 1972. GPA 3.28/4.00.

Mississippi State University. M.S. in Computer Science, 1973. GPA 4.00/4.00.

Significant work in industrial engineering and large systems design (e.g. classroom scheduling).

CDP certification from the Institute for Certification of Computer Professionals (ICCP) in 1987.