

Managing Director. Story-based Resume.

FXMBA CONSULTING

Expert at shepherding people and products through challenging times via strategic business expansion and consolidation strategies; Benefitted from great mentors; Committed to developing others

PROFESSIONAL.....

2015 - 2017 **SAN FRANCISCO CONFERENCE CENTER** | Tech industry conference provider San Francisco

Managing Director

Hired to take over SFCC leadership from founder and to infuse fresh ideas & shepherd change at SFCC; Vision: to deliver 'must attend' events to tech industry professionals; Responsible for \$40M P&L, 85 employees and 100+ annual events

LEADERSHIP & STRATEGY

- SFCC saw revenue decline from 2010-14; Arriving in 2015, developed strategic initiatives around people, processes & product to drive top and bottom-lines:
 - Consolidated 20% of event portfolio resulting in immediate \$1M improvement to the bottom-line; Maintained sponsorship levels and increased attendance; Advocating for expansion to Fintech & AI spaces
- Surveyed employees and identified low engagement and low morale as impediments to long-term success; Led series of town hall meetings; Found lack of consistency across policies & practices to be core organizational issue:
 - Developed company-wide compensation & bonus planning; Standardized annual performance review process and introduced lunchtime training sessions and hired external consultants to develop employee skillsets

OPERATIONS

- Leadership lacked a dashboard with insight into event-level operations *and* financial performance; Streamlined financial planning and forecasting with monthly review of performance, budgets, risk and contingency strategies
- Brought previously outsourced event operations and talent in-house: for example, negotiated directly with hotels rather than using an intermediary (saved \$800k year in commission fees – a figure that shocked owners)

2003 - 2014 **FORRESTER** | World's leading provider of technology research and advisory Boston

VP of Worldwide Events 2011-14

VP of North American Events 2008-10

Head of North American Event Operations 2003-07

Led strategy, operations and marketing for worldwide events division, grew revenue \$75M in 2011 → \$210M in 2016 Grew footprint of Forrester's flagship CEOExpo from 6 to 8 regions; Led team of 38 direct reports and regional managers

LEADERSHIP & STRATEGY

- Repositioned Forrester Events as a primary revenue driver for research sales rather than self-contained product line
 - Tailored Events: Placed great value on face-to-face discussions with CIOs, CTOs and Heads of Business, as a result revamped conference topics and product mix to align with customer interests (e.g. emerging technology trends)
 - Bolstered Reputation: First mover to launch events in BI (Analytics), IT Security & Infrastructure spaces
 - Trained Staff: Goal was to begin leveraging events for a) lead generation and b) closing research contracts; Used personality test to identify introverts vs. extroverts and offer bespoke sales training to Sales & Marketing teams
- Worked closely with Forrester's CEO & executives; Learned to solve for strategic issues on a global scale:
 - Global event revenue dropped \$180M → \$80M during 2008 financial crisis; Spearheaded a conceptual shift which remains hallmark of Forrester conferences: from topically-driven to persona-based events
 - Introduced integrated marketing programs to help Sales consolidate number of client touch points and to help Research tailor insights to 'Who' (IT Execs, Ops etc.) instead of 'What' (BI, Infrastructure etc.)

OPERATIONS

- Identified the lack of standards around event discounts as detrimental to margins and the brand's value proposition:
 - Introduced new guidelines and helped employees shift thinking from short-term 'wins' to long-term revenue gains by a) analyzing the sales funnel and b) performing sensitivity testing to maximize sales and define triggers
- Relied on strong interpersonal skills to build sales-generating relationships with Fortune-100 CEOs such as Tim Cook, Larry Page, Jack Dorsey; Secured first-ever CEOExpo attendance by an HP CEO when Meg Whitman participated in 2014

1996 - 2002 **BLOOMBERG, WACHOVIA BANK, MKG EVENTS** Los Angeles & New York

Marketing, Sales & Communications Management

EDUCATION.....

1996 **NEW YORK UNIVERSITY** New York

Bachelor of Arts in Communications