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Pete the Planner® Financial Wellness (April 2017 – Current)

Director of Client Success

- Overall accountability for all client onboarding, engagement, goals and retention.
- Host all client discussions and meetings to understand their culture, organizational goals and ongoing engagement needs.
- Build and cultivate relationships with critical partnerships that help drive business development.
- Responsible for all business development leads, qualifications and contracting.
- Manage communicating new initiatives, offerings and important announcements on an ongoing basis.
- In first year, have renewed over 90% of current clients, have sold in new programming to all renewals and helped almost triple current client base.
- Have redesigned and established new operations processes for onboarding and engagement of program offerings.

DEFENDERS (January 2012 – April 2017)

trueU Division, Director of Member Engagement and Member Engagement Manager

- Built the operations and company engagement experience from the ground up for this new member-driven organization.
- Overall responsibility for member company engagement, ensuring value in provided offerings and securing member retention.
- Oversaw the Member Engagement Team to ensure they had all tools and support necessary to best serve member companies.
- Built relationships with key stakeholders in member organizations and partners, and served as a key point of contact between the trueU team and member companies, member prospects, board, member advisory council, vendors and other external stakeholders.
- Responsible for the operational plan and execution of trueU programs and events. To include but not limited to: member onboardings, member engagement meetings, member experiences, networking events, annual convention.
- Developed, tracked and analyzed key metrics to ensure the mission of trueU is producing the desired value for the member organizations.

Super Service Challenge/Companies With A Mission Division, Project Manager

- Built, designed and executed the concept of the Super Service Challenge from a local Indiana program to a now nationwide program encompassing thousands of participants.
- Led the design and creation of all registration processes, marketing materials and communications.
- Coordinated and executed service projects and celebration events in multiple locations.
- Implemented the Companies With A Mission vision into various companies that desired to have a purpose bigger than profits.
- Managed multiple service trips to Mexico and the Dominican Republic for business leaders and their companies and families.
- Oversaw and implemented other projects for an entrepreneurial CEO.

Indy Chamber (April 2011 – December 2011)

Events Manager

- Responsible for contributing to Chamber goals of membership, community, revenue and relationship growth by generating non-dues revenue through member programs and events.
- Worked collaboratively with event, sales and marketing team members to ensure programs were in line with strategic and annual sales plans, goals and values.

- Coordinated and executed large scale event operations with other departments to ensure timely and accurate marketing of events and production of sponsorship materials.

Ashfield Healthcare – formerly UniversalProcon (June 2006 – March 2011)

Operations Manager

- Overall accountability for the operations management of project teams for meetings and events for global pharmaceutical companies.
- Developed and maintained key client and vendor relationships.
- Accountable for operational team's morale, training objectives, performance management, internal communications and resource management.
- Management of financial objectives, budgets, forecasts and management fee decisions.
- Responsible for quality management and compliance for pharmaceutical company guidelines, the implementation and communication to the operational teams and ongoing development of standard operating procedures.
- Oversaw management of hotel sourcing negotiations and development of contracts.

Associate Operations Manager

- Developed and maintained key client and vendor relationships.
- Accountable for assigned operational team's morale, training objectives, performance management, internal communications and resource management.
- Responsible for quality management and compliance for pharmaceutical company guidelines, the implementation and communication to the operational teams and ongoing development of standard operating procedures.
- Responsible for project management of invitation, attendee management, meeting registration, compliance, travel, Cvent website development, reporting, business critical deadlines, vendor and client relations for global and domestic programs for pharmaceutical companies.
- Awarded company's annual 'Mover & Shaker' Award.

Senior Project Manager (promoted from Project Manager within 1 year)

- Responsible for project management of invitation, attendee management, meeting registration, compliance, travel, StarCite website development, reporting, business critical deadlines, vendor and client relations for global and domestic programs for pharmaceutical companies.
- Acquired repeat client contacts through successful execution and delivery of programs with multiple team members and partners.
- Accountable for cost avoidance and savings, efficient scope management and final reconciliations.
- Achieved all client and company-driven service level agreements and management of key account programs.

Hyatt Regency Indianapolis (May 2000 – June 2006)

Convention Services Manager

- Responsible for overall execution of city-wide conventions and large in-house hotel programs.
- Primary logistical liaison for groups and all hotel departments.
- Administered sales agreements, forecasted banquet revenues and maximized up-selling.
- Facilitated site visits, client meetings and inter-departmental meetings.

Executive Assistant to General Manager, Sales Assistant & Rooms Division Intern

- Day-to-day administration of executive offices for General Manager, Food and Beverage Director and Rooms Executive.
- Coordination of VIP client events and guests.
- Analyzed data and reports for the business in support of the executive team.

Indiana State University, May 2000

B.S. Recreation and Sports Management, Minor in Business Administration