CHRISTY SMITH

ENGAGEMENT STRATEGY LEADER

PROFILE

Client engagement and distribution strategist with deep knowledge working at multiplex organizations. Experience in relationship management, sales, change management and project management, delivering industry-leading client centric solutions aligned with strategic vision of organizational goals. Strong interpersonal and management skills, as well as proven ability to interact and clearly articulate across organizations to engage and influence all levels of employees.

CONTACT

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EXPERIENCE

STATE STREET GLOBAL ADVISORS
2014 - Present

VICE PRESIDENT, DIRECTOR OF CLIENT ENGAGEMENT STRATEGY

- Champion of State Street Global Advisors institutional client engagement initiatives including distribution strategy, business process optimization, project execution, and leveraging technology for workforce management
- Designed client health scorecards, triggering clients at risk and optimizing customer retention efforts
- Created interactive client dashboards, aligning internal stakeholders and enabling seamless execution of client journey, resulting in proactive client retention.
- Develop and execute tools and resources that enable successful relationship management. Devised relationship manager scorecard to establish a consistent client engagement framework and cohering team activity with Firm's mission
- Established distribution strategy to scale client communications, driving cohesive messaging, facilitating workflow management and building transparency to track progress, prioritize and report on deliverables.
- Directed, lead and implemented State Streets recovery resolution plan to transfer more than $1.3 trillion assets under management and over 1,500 clients globally to a new subsidiary of State Street. Successfully executed project deliverables in less than 9 months and achieved 100% client retention.
- Oversee successful delivery of Know Your Customer Due Diligence Transformation of over 2,000 contracting entities. Drive timely client engagement, liaison between client facing teams and operation teams to meet key client deliverables and aid analytics to track progress
- Manage rollout of Salesforce.com to North America Client Facing. Align global workflow management and reporting with technology and reporting. Asses business need against resources and long-term strategic direction. Train Client Facing Teams, implement changes to align technology with business procedures and vision

ASSISTANT VICE PRESIDENT, CLIENT RELATIONSHIP MANAGER

- Internal Relationship Manager for Institutions and Official Institutions in North America and Latin America
- Responsible for implementation and ongoing service needs of over 100 clients representing over $35 million in revenue, including presentations, reporting, billing, planning, communications and ad hoc client requests

EXPERIENCE

FIDELITY CHARITABLE
2012 - 2014

CLIENT SERVICE MANAGER, ADVISOR SERVICE TEAM

- Lead growth of a 3-person team to an 8-individuals multi-site team with 5 direct reports
- Manage relationships with advisors on more than 5,500 accounts, including participants in the Charitable Investment Advisor Program representing over $3.5 billion in Fidelity Charitable Donor Advised Fund assets
- Coach Senior Client Service Representatives and Client Service Representatives, developing skills, challenging and motivating associates to demonstrate performance excellence
- Key contributing member of Agile team charged with leading the firm's strategic initiatives including migration and implementation of Advent on Demand, Advisor Experience, Non-Fidelity Custodian Charitable Investment Advisor Program
- Lead process management and strategic partner relationships with internal and external business units including Fidelity's Institutional Wealth Services, Family Office, Capital Markets and Fidelity Charitable's Program, Private Donor Group, Compliance, Sales, Technology, Contributions and Marketing
- Transform Advisor Service Team's policy and procedures to drive quality assurance, mitigate risk and create efficiencies

JENSEN INVESTMENT MANAGEMENT
2010 - 2011

INTERNAL SALES MANAGER

- Internal sales representative for intermediary marketplace driving over $163 million in net purchases over twelve month period
- Successfully designed customized cloud based client relationship management interface resulting in greater efficiencies for the firm and an effective resource for lead generation
- Wrote request for proposal and due diligence proposals in response to advisor inquires, set strategic direction for the firms advisor fund raising, analyzed fund flow data to identify opportunities and defined new relationship channels

MERRILL LYNCH
2007 - 2010

FINANCIAL ADVISOR (WEALTH STRATEGY PLANNING)

- Proven record of establishing customized client solutions, including detailed retirement planning solutions, cash management strategies, education plans, equity compensation analyses, wealth accumulation and wealth preservation strategies
- Analyzed, evaluated and ranked potential portfolio companies for team lead equity portfolio. Provided research and analysis for selection of external money managers using monthly screening and quarterly performance reviews

EXPERIENCE, INC.
2006 - 2007

CORPORATE ACCOUNT MANAGER

- Managed client relationships for recruitment advertising focused .com start-up

EDUCATION

HAMILTON COLLEGE
Bachelor of Arts
May 2006

CREDENTIALS

- LEAN PRACTITIONER
- SERIES 7 GENERAL SECURITIES REGISTERED REPRESENTATIVE
- SERIES 63 UNIFORM SECURITIES REGISTERED REPRESENTATIVE