
**CUSTOMER RELATIONSHIP MANAGEMENT (CRM) CONSULTANT SPECIALIZING IN
SALESFORCE IMPLEMENTATIONS | PROJECT & PROGRAM MANAGEMENT | BUSINESS ANALYSIS**

Highly motivated, analytical, and client-focused consultant with 15+ years of experience that includes a track record of implementing and managing customer relationship management (CRM) systems enterprise-wide. Strong background in supporting merger and acquisition efforts by successfully integrating newly acquired systems, data, and programs with minimal downtime. Proven success in leading small-to-large scale and complex projects according to schedule, scope, and budget with an aptitude for removing project barriers and eliminating risk to ensure successful execution. Expertise in managing Salesforce systems, training end users, and driving technology adoption across all organizational levels.

CORE STRENGTHS

Project Planning & Delivery | CRM System Implementations | Salesforce Administration | Strategic Planning | Data Analytics
Prospect Research | Customer Data | Customer Relationship Management | Sales Operations Management | Sales Reports
Dashboard, Report & Query Design | Merger & Acquisition Integration | Market Research & Analysis | Prospecting Data
Performance Measurement | Organizational Change Management | Relationship Management | End User Training

PROFESSIONAL EXPERIENCE

HANCOCK HOLDING CO. | WHITNEY BANK, Mandeville, LA

2009-4/2016

Client Knowledge Manager, Performance & Analytics

Managed a team of seven analysts in the commercial banking products and services division along with all commercial/business banking and wealth management sales/service support functions. Oversaw a million dollar vendor budget and Salesforce system. Served as subject matter expert in pipeline opportunity management, relationship planning, and goal tracking. Ensured the highest levels of client data integrity. Executed performance and analytics strategy.

- Led the implementation and ongoing management of Salesforce systems enterprise-wide; oversaw the entire project lifecycle from defining business requirements, vendor selection, design, implementation, data conversion, reporting, initial setup and post-support including administration, policies, and procedures.
- Implemented and managed CRM functionality including client/prospect data integration, teams, pipelines, activities, contacts, relationship summary, service requests, product implementation, alerts and metrics with rollups/drilldowns.
- Trained and guided 500 end users across all organizational levels on using newly implemented systems including Salesforce CRM; integrated industry leading best practices and facilitated knowledge sharing.
- Directed multiple complex projects according to requirements, costs, and timelines including enterprise customer data, Fidelity RM system conversion, householding, and segmentation projects related to Whitney/Hancock merger.
- Supported sales and service for all commercial, business, and wealth banking areas; designed sales and relationship reports and conducted analysis for all executive and user roles.
- Played a key role in multiple mergers and acquisitions by successfully integrating systems, data, and processes of newly acquired companies into the organization with limited business impacts.
- Oversaw all vendor management; developed strong partnerships with Salesforce and various App Exchange partners including Silverline, Accenture/Cloud Sherpas, Avention/OneSource, InfoGroup, LinkedIn Sales Navigator, Greenwich Research, McKinsey, and S&P.

CAPITAL ONE BANK | HIBERNIA NATIONAL BANK, New Orleans, LA (Capital One Acquired Hibernia)

2000-2009

Commercial Sales Performance Manager / Commercial Knowledge Manager, Strategy, Sales & Infrastructure

Led a high performing team of 20 analysts and client services associates that provided sales support, customer data reporting, and incentives management with direct oversight of a professional services budget. Managed customer profitability reporting for Capital One's commercial line of business along with intranet, document repository, and internet content. Delivered sales/service support tools for business development and retention. Consulted on CRM/loan origination systems.

Commercial Knowledge Manager, Strategy, Sales & Infrastructure (Continued)

- Participated in Siebel CRM selection, design, and implementation; served as business lead for a customer relationship management project for commercial banking and bank data warehouse reporting.
- Oversaw YOUcentric CRM system and reporting including client relationship reporting for internal commercial banking customers including sales, portfolio, product, process and relationship managers along with administrators, client service representatives, and analysts.
- Led and executed multiple Capital One/Hibernia acquisition projects related to customer data, change management, training, and communication.
- Directed CRM system development, vendor selection, commercial client data management, and reporting; coordinated research, communication, training, financial planning/analysis, and client service functions for commercial banking.
- Played an integral role in multiple bank conversions, integrations, and target operating model projects; provided subject matter expertise for commercial banking transformation projects for bank acquisitions, such as householding and officer code/cost center data governance.
- Managed business analysis and business process management methodologies; collaborated extensively with technology teams in solutions architecture and information security efforts.
- Oversaw customer data stewardship including household, officer, cost center, and hierarchy maintenance; tested enterprise data systems and provided high-value client master data management, training, and marketing.

PRIOR PROFESSIONAL EXPERIENCE

OCHSNER HEALTH PLAN, Metairie, LA

Market Research & Planning Manager, Marketing

Oversaw market research, leads management, and proposal support for a health maintenance organization. Facilitated strategic planning processes, created executive presentations, and collaborated with internal team's companywide.

ALTON OCHSNER MEDICAL FOUNDATION, Jefferson, LA

Sr. Planning Analyst, Strategic Planning

Conducted various analyses to support critical strategic plans and business decisions for a health care provider system consisting of hospitals, multi-specialty clinics, and HMOs. Executed financial planning and utilized profitability methodology.

- Performed comprehensive strategic, market, and business/product planning including supply and demand analyses for healthcare services.

Early career history includes **Research Associate** at ROBERT SIEGEL & ASSOCIATES and **Market Development Analyst** at POPEYE'S.

EDUCATION AND CERTIFICATIONS

Master of Business Administration, Finance Concentration (MBA) | UNIVERSITY OF NEW ORLEANS

Bachelor of Arts in English (BA) | UNIVERSITY OF NEW ORLEANS

Certified Salesforce Administrator



Salesforce Administrator 201 and CRT 101 Training; Trailhead

TECHNICAL SKILLS

Salesforce CRM, Microsoft SQL Server Reporting, OBIEE, Business Objects, Oracle Siebel CRM, Oracle BI, Advanced Microsoft Access, Excel, PowerPoint