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OVERVIEW

Strategic Business Planning Director/Associate Director with ten years of experience in strategic planning processes and plans, strategic and financial analysis, portfolio planning, market research, market positioning, and new business planning. Wharton degrees in strategic planning, finance, marketing, decision analysis and accounting. Managed R&D and capital investment decision support for up to \$1 billion portfolio.

Enhanced insight through several years directing product management and earlier exposure to marketing, financial accounting and systems, software development, and a range of industries. Exceptional at assessing opportunities from multiple perspectives -- financial, strategic, operational, and external.

- ♦ Strategic and financial planning
 - ♦ Funding portfolio prioritization (corporate and product group)
 - ♦ Strategic planning process, plans
 - ♦ Hoshin / Strategic Management
 - ♦ New business development planning
 - ♦ Product management and marketing
 - ♦ Financial analysis and business cases
 - ♦ Wharton MBA & BS, CPA
 - ♦ Internet & telecom services, plus exposure to others (cable, wireless data, smartphone apps, ...)
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EXPERIENCE

PROFESSIONAL SERVICE GROUP of CENTRAL NJ

2008 – Present

Director Emeritus & Strategic Planning Committee Member (2010 – present)

Provided continuity and leadership for PSGCNJ's Technology programs, Strategic Planning, Bylaws, other groups within PSGCNJ, and other PSG entities in NJ. Continued executing particular programs.

Director of Technology (2008 – 2011)

Directed technology for this rapidly-growing organization supported by the NJ Dept of Labor, including program management, organization leadership, business analysis / design / planning / development / lifecycle management, and operations. Board of Directors member.

- ♦ Partnered with other founders to launch this organization, contributing technical and collaborative leadership that were essential to our exponential growth to nearly 300 client-members.
- ♦ Launched online presence and content, including web 2.0 social networking, online video services, and client-server database initiative. Also managed traditional technology (databases, webinars, WiFi, phone, etc.) and initiated the first statewide multi-PSG collaborations.

AT&T CORPORATION

1988 – 2007

Investment Strategy Planning / Decision Support Director/Assoc. Director, AT&T Business (2004 – 2007)

Managed portfolio process and analysis for funding of new development and capital investment projects totaling up to \$1 billion, resulting in strategically and financially optimized funding program portfolio.

- ♦ Continuously realigned optimal investment portfolio toward the best balance of maximum aggregate ROI, strategic positioning for the future, and superior near-term competitive market position.
 - ♦ Reduced total portfolio funding requirements 5%-10% by increasing funding candidate granularity 4x.
 - ♦ Achieved 4x increases in analysis work volume with 33% reduction in staff by developing new data collection, management, integration, and analysis tools.
 - ♦ Initiated work on new approaches to incorporate potential futures (real options, technology roadmaps).
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EXPERIENCE (continued)

IP Network Product Management Director (Assoc. Dir.), AT&T Data and Internet Services (1999 – 2004)

Directed AT&T's Internet backbone network's growth from a second-tier contender to lead the industry in reliability, performance, technology, traffic, and market position. Also directed cost structure initiatives, external relationships, strategy and market positioning. (See *Addendum* for additional scope competencies.)

- ♦ Steadily improved costs through new technologies, tight spending control, corrected cost allocations, and replacing upstream providers with unpaid peering, thereby enabling continued competitive pricing that was critical to growing this >\$1 billion business as market prices fell up to 40% per year.
- ♦ Successfully prevented excessive government and industry policies at state, national, and international levels by partnering with lobbying experts, peer competitors, and government agencies, avoiding more than \$20 million in incremental operating costs.
- ♦ Directed cross-organizational, cross-functional teams to industry-leading breakthrough achievements and market positioning needed to become the #1 market leader in business Internet services.
 - Tripled network traffic in each of first 3 years, overtaking both the former leader and voice long-distance.
 - Industry's best performance (*Boardwatch*, May 2002; *et al*), enabling industry-leading SLA guarantees.
 - Industry's first coast-to-coast OC-192 (10Gbps) IP backbone, first OC-768-ready, first OC-48 IP backbone.

Product Management Associate Director, Customer Care Services, AT&T Worldnet (1997 – 1999)

Directed strategy, policy, cost-reductions, and escalations for this second-highest cost area of this major ISP, including internal & external supplier negotiation and management. Led cross-functional management team, quantitatively identifying causes and opportunities. Managed over 80 active and upcoming projects, set priorities and negotiated priority vs. other Worldnet projects, and personally led priority projects.

- ♦ Created 50% cost reduction vision paradigm shift to self-service online and self-healing on-PC technology, achieving 20% reduction before reassigned to lead highest-cost area (the network).

District Manager, New Business Development, AT&T Worldnet (1996 – 1997)

Led the identification, planning, and development of new service technologies for the largest US non-proprietary Internet access service provider (ISP). Negotiated new opportunities with technology suppliers and executives, and supported analyses with market research, detailed business cases, and project plans.

- ♦ Pursued \$200 million new consumer service concept (concept creation, development team management, primary market research, trial planning), deployed post-1997.

District Manager *et al*, Strategic Planning, AT&T Network Systems (1990 – 1996)

(renamed Lucent Technologies in 1996; later became Alcatel-Lucent)

Strategic Planning and Strategy Deployment for \$20 billion Network Systems business, and previously for its \$3 billion Transmission Systems business. Managed Strategic Plan process and strategic analyses, including portfolio and competitive analysis, revenue gap analysis, CVA (customer value added), M&A (joint venture and acquisition analysis, divestiture prospectus), and reorganization design. Also expert member of Hoshin Planning and Total Quality Management teams.

- ♦ Promoted twice, reaching District Manager at the corporate group level.
- ♦ Innovated and introduced Strategy Deployment complement to Hoshin / Policy Deployment.
- ♦ Led strategy in Business Improvement leadership team, revolutionizing employee alignment to company goals and resulting in AT&T winning the U.S. Dept. of Commerce Malcolm Baldrige National Quality Award (awarded by President Bush, 1992).



EXPERIENCE (continued)**ADDITIONAL PROFESSIONAL EXPERIENCE**

Progression of employment and entrepreneurship leading to above, involving:

- Marketing, sales, market research, competitive analysis.
- Software Application Development (C++ , Intel, Assembly, Java, Access, Excel/VBA).
- Business analysis and strategy (corporate strategic planning, market research and business analysis, new business development analysis, consulting).
- Financial accounting / CPA (PricewaterhouseCoopers).

EDUCATION AND PROFESSIONAL DEVELOPMENT**THE WHARTON SCHOOL**, University of Pennsylvania

- Master of Business Administration (MBA) – Marketing, Management, and Finance triple majors.
- Bachelor of Science (BS) – Decision Sciences/IT and Accounting dual majors; research in blood bank optimization modeling.

Certified Public Accountant (CPA) – Commonwealth of Pennsylvania.

NJ Dept. of Education Certificate of Eligibility (Business Education).

AT&T Corp.

- Telecom technology and processes, quality management, public speaking/media, supervision, and Leadership Development Program.

Product Development and Management Association (PDMA)

Cable & Telecommunications Association for Marketing (CTAM)

Society of Cable Telecommunications Engineers (SCTE)

Wharton Alumni Association (Board member; webinar training program manager/host and educator)

ADDENDUM:

DEMONSTRATED COMPETENCIES

Strategy & Planning:

- ♦ Strategic planning process and strategic plans
- ♦ Business investment portfolio planning and management for growth, profitability, and regulatory compliance
- ♦ R&D and capital portfolio funding allocation incorporating critical-path resource contention and value of potential future options
- ♦ Strategy analysis (products/technologies, markets, SWOT, Porter industry forces, pricing, cost structure)
- ♦ New business development analysis and planning
- ♦ Business cases and financial analysis
- ♦ Gap analysis
- ♦ Decision modeling
- ♦ Hoshin planning / Strategic Management
- ♦ Wharton MBA, triple-majors in Strategic Planning, Marketing, & Finance

Finance & Accounting:

- ♦ Business plans and cases
- ♦ Financial analysis and resource portfolio allocation
- ♦ Competitive cost structure analysis and cost reduction initiatives
- ♦ Financial accounting and systems reviews, including “cost-plus” supplier contract audits
- ♦ M&A analysis (JV, acquisition, divestiture prospectus)
- ♦ Certified Public Accountant (CPA)
- ♦ Wharton MBA, Finance; Wharton BS, Accounting

Product Management:

- ♦ Product management and marketing
- ♦ New product service planning
- ♦ Oversight of development introduction process.
- ♦ Concept-to-deployment project management
- ♦ New business development (ideation, planning, negotiation, implementation)
- ♦ Competitive analysis
- ♦ Pricing (internal) and pricing analysis (competitive)
- ♦ Capacity management oversight and issue resolution
- ♦ Competitive cost structure analysis and cost reduction initiatives
- ♦ Contract terms and negotiations, including special deals and competitor cooperation (network peering), both domestic and international.
- ♦ Acceptable use and service level agreement policies
- ♦ Supplier and development negotiations and management (specific projects)
- ♦ Political lobbying and industry standards strategic analysis and positioning at state, national, and international levels.

Marketing:

- ♦ Product management (network services, care function, and new .com services)
- ♦ Competitive market positioning / product positioning
- ♦ Customer relationship management (inside sales)
- ♦ Sales channel and customer escalations and negotiations
- ♦ Represented services and trends to industry analysts, media, and conferences
- ♦ Market research (primary and secondary)
- ♦ Sales training and trade show planning and delivery (limited)

Leadership:

- ♦ Cross-functional team building and management (large and small teams)
- ♦ Performance management and continuous improvement
- ♦ Vision / paradigm shift leadership
- ♦ Team motivational leadership during both growth periods and corporate downsizings
- ♦ Supervisor responsibilities (9 years) – management, direction, coaching, plus mentoring.
- ♦ Organizational design planning (limited)

Technologies:

- ♦ IP / Internet networks and services
- ♦ Web site creation and Web 2.0 business applications including online webinars and video
- ♦ Network and service performance analysis and tools
- ♦ Telecommunications infrastructure and services, including web hosting network infrastructure
- ♦ Customer support web site and tools
- ♦ PC and Internet server-based applications
- ♦ New technology deployment project leadership
- ♦ Software development (C++, ObjC, Assembly, Java, Access, Excel/VBA, HTML, Javascript, PHP, MySQL)
- ♦ Rapidly embrace strategic new technologies (e.g., cable technologies, wireless smartphone apps)

Market Segments:

- ♦ Business Internet and telecommunications services (large, medium, and SOHO small office/home office)
- ♦ Wholesale Internet services to downstream ISP's
- ♦ Consumer Internet Service Provider (ISP) services
- ♦ Carrier-grade equipment, software, and systems
- ♦ Software development (consulting and for retail)
- ♦ App software (iPhone/iPad, Android, STB, IPTV)
- ♦ Accounting and financial analysis services
- ♦ Prior exposure to pharmaceuticals/healthcare et al

