

DOUGLAS MILLER



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EXPERTISE

\$MM Revenue Growth

Analytics

Annual Financial Planning

Behavior Design

Business Intelligence

Corporate Strategy

Disruptive Innovation

KPIs

Leadership Development

M&A

National Sales

Risk Management

Reporting

Staffing Models



EDUCATION

BUCKNELL UNIVERSITY

B.S. in Business Accounting

Minor: Economics

EXECUTIVE DIRECTOR FINANCE AND BANKING INDUSTRY LEADER

Nationally respected senior executive with unique combination of astute financial prowess, keen economic trend awareness, and disruptive national sales strategy expertise.

EXECUTIVE CAREER HIGHLIGHTS

Wells Mutual, Chicago, IL, New York, NY, 1999 - 2017

Leading global financial services firm and one of the largest banking institutions in U.S., with operations worldwide.

Executive Director, Business Banking Finance 2014–2017
Developed annual volume, balance, and revenue plans for Business Banking Loan Book, totaling \$22B+ in outstanding balances and \$1B in annual revenue. Led 5 direct reports with oversight of 300+ managers and 2,500+ bankers in field.

NATIONAL SALES

- Fueled new loan origination volumes to \$7B annually, highest level in company history. Disrupted status quo among field bankers and management and initiated positive behavior change through extensive, national mentoring, coaching, and training efforts

CORPORATE STRATEGY

- Analyze market behavior, define packages for \$86M revenue stream and personally deliver program and key messages to 300+ managers nationwide annually.
- Crafted communication plan for unavoidable regulatory price increase passed on to customer base, reversing typical practice of pushing out cost increases without explanation.

COMPLEX ANALYTICS

- Functioned as corporate point person for evaluating potential effects of adverse economic and financial market conditions, which set strategy and KP's for all national bank branch managers.
- Revealed untapped, multimillion-dollar revenue potential and unique market offerings after partnering with corporate Finance, Risk, and Center for Excellence Around Macroeconomics teams to develop highly complex measures.
- Architected and achieved federal approval for quantitative models, in response to Federal Reserve Bank stress-testing requirements for CCAR, ICAAP, and Risk Appetite exercises.

CFO, National Sales, Business Banking, Chicago, IL 2012–2014

Chosen to provide analytic, strategic, and financial support to Business Banking sales organization, consisting of 7 regions, 2,700+ bankers and 300+ managers, serving 600K customers with \$65B in deposits, \$18B in loans and over \$2B in annual revenue. Merger combined ~800 bankers in Relationship Managed (RM) channel with ~2,000 bankers in branch channel.

CORPORATE SALES & STAFFING STRATEGY

- Restructured production/sales targets and built annual financial plan to increase accountability among bankers, improve customer service, and align metrics at region, market, and area levels.
- Established monthly analysis, linking revenue growth to banker production and calling activity, resulting in 36% increase in new business and 24% desired attrition.
- Implemented analytics, staffing model, and segmentation projects to evaluate portfolio loads, prospect density, and branch coverage. Corrected alignment for tens of 1,000s of customers to appropriate banker expertise.

CFO, Relationship Managed (RM) Channel, Business Banking, Chicago, IL 2007–2012

Directed strategic and operational financial management for \$1B per year business with \$30B in deposits, and \$12B in credit balances, focused on small- and mid-sized business with \$3M-\$20M annual sales in highly volatile economy.

CFO, Relationship Managed (RM) Channel (continued)**CORPORATE SALES & REPORTING STRATEGY**

- Initiated and created monthly management reporting process to correct glaring inconsistencies and accountability across 9 sales regions and 94 markets, combining financial results with branch productivity, calling prospecting activity, and credit quality metrics.

CORPORATE STRATEGY HIGHLIGHTS

- Built robust RM staffing model to handle not only RM channel requirements, but also acquisition of and unpredictable growth from former Wells Mutual customers. Used average portfolio size, prospect density and branch penetration to determine optimal staffing levels in all markets; grew from 0 to 500 bankers.
- Rectified 100s-of-millions of dollars of mismatched commercial retail customers and bankers through collaborative effort with senior banking managers companywide.
- Improved individual productivity per banker and brought banks into corporate alignment by analyzing national, regional, and branch customer base and implementing relevant, market-specific targets for all sales teams. Achieved buy-in to new, more meaningful program through heavy collaboration with bank management.

NATIONAL SALES STRATEGY IMPACT

- Experienced 10% growth year over year (YOY) in existing markets and 30% YOY growth in expansion markets, despite consumer lack of trust in banking industry during volatile time.
- Drove 200+% new customer-acquisition growth within first year by changing banker incentive plans to better align with RM Channel strategy.

Vice President – Business Banking Finance | Chicago, IL | 2005–2007

Regional finance manager for Central, Midwest and East region branch-based business sales organizations.

REGIONAL SALES STRATEGY

- Provided insights and analysis from sales production results to sales force, driving increased acquisition and retention. Sales force focused on customers with < \$3M annually in sales.
- Researched and analyzed regional business differences, sales strategies for each, and effectiveness of current KPIs. Defined refined data, revamped KPIs, and designed meaningful sales reporting scorecards to assist regional managers and sales force to make bigger impact.

EARLIER WELLS MUTUAL CAREER**Vice President – Finance / Planning and Analysis | Chicago, IL | 2004–2005**

Act as liaison between Corporate P&A and retail businesses, with specific focus on consumer banking, business banking, and insurance businesses. Assisted in building out annual planning and monthly management reporting and outlook processes for Wells Mutual retail businesses. Prepared investor conference and board presentations for senior management.

Vice President – Finance / Controller | New York, NY | 200 –2004

Originated management reporting and planning process for newly launched employee financial services unit; business unit disbanded after merger with Bank Omni in January.

Vice President – Marketing Analytics | New York, NY | 1999–2003**BUSINESS ANALYTICS**

- Managed a team of 8 analysts responsible for optimizing credit card marketing spending to realize highest return on investment while delivering on new account goals of 4M accounts and generating \$185M in revenue.
- Built and maintained credit card profitability models for multiple card products; used models to test and evaluate value propositions designed to enhance bottom-line growth through incremental acquisition and card usage.
- Collaborated with quantitative analysts to pilot experimental design, analyzing highest return on investment.

PRIOR EXPERIENCE

Senior Pricing Analyst, Finance | Executive Management Services, Inc. | Philadelphia, PA

Corporate Strategy Senior Analyst, Global Planning / Analysis Dept. | MasterCard International, Inc. | Purchase, NY

Explanation & Strategy

Douglas felt he had fulfilled all challenges in his current role and was looking for an exciting new ED opportunity with a startup organization. He was looking for an opportunity where he could combine complex analytics with team building / leadership and setting corporate strategy.

He was an interesting challenge in that his career was built in analyzing corporate banking, but he also always gravitated towards behavior design in each of his positions. He understood people as much as he understood numbers and economics and he wanted to continue to utilize his strengths in his next role. We needed to showcase his leadership, initiative, innovation, big-picture thinking, business development, and financial/analytical skills.

He instinctively understands and identifies problem areas and quickly turns around those problems in creative ways. It was important to establish him as an innovator in not only processes, but also behavior changes, with sound, quantifiable results.

He was very satisfied with the end product and his resume has opened many doors to date.