**STEVEN M. JEFFES** 358 West Road ▪ Stephentown, NY 12168

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<http://stevenjeffes.wordpress.com/>

I am a highly accomplished and results-oriented **Marketing**, **Communications, Social Media**, **Public Relations, Brand Management, Customer Relationship Management (CRM), Project Management and IT Executive** with over 15 years of experience delivering world-class marketing and CRM programs for global companies and clients.

In my career I have **received nearly 100 awards** and letters of appreciation/commendation from Fortune 500 organizations\*\* for significant contributions associated with designing projects to deliver impactful marketing, communications, social media and customer excellence programs. Sample awards:

### Sample Awards & Commendation Letters (selected from 100+ awards)

|  |  |  |
| --- | --- | --- |
| ***Organization*** | **Award/Letter** | **Award URL-Link** |
| * ***Unica*** | * Marketing Vision Project | [Unica Letter for My Consulting Efforts](http://www.stevenjeffes.com/Unica_Recognition.html) |
| * ***Macy\*s*** | Organizational Re-Design | Marketing Re-Design & Change Management |
| * **Vanguard** | * Marketing Technology Selection | [Vanguard Client Excellence](http://www.stevenjeffes.com/Vanguard_High_Performance.html) |
| * **Regent Cruises** | * Marketing Vision Definition | [Marketing Vision Development Recognition](http://www.stevenjeffes.com/rsscl.html) |
| * **Reader’s Digest** | * Marketing Process Design | [Recognition for Campaign Management Expertise](http://www.stevenjeffes.com/Readers.html) |
| * **Pilot Radio** | * Public Relations Excellence | [Excellence as Director of Media & Public Relations](http://www.stevenjeffes.com/Public_Relations_Recognition.html) |
| * **AXA Insurance** | * Sales Process Optimization | “Outstanding Contributions” - Sales Effectiveness |
| * **General Electric** | * Turn-Around of $100MM Program | [Critical Design Review Award for Leadership](http://www.stevenjeffes.com/GE_CDR_Award.html) |

\*\*Sample Project Organizations: SONY, Siebel & Oracle Systems, AOL Time Warner, Intuit Software, SAS, Unica Software, Neopost Software, Regent Cruise Lines, Allstate, US DOD, AXA Insurance, Welch Allyn Medical Systems, Starwood Hotels, General Mills, Wyeth, Astra-Zenica, American Express, Proctor & Gamble, Fannie Mae, Pfizer, First Union, Vanguard, Bristol-Myers Squibb, Citibank, Macy\*s, Reader’s Digest, AT&T, Teva & Sepracor Pharmaceuticals, Disney Entertainment.

### Selected Experience Profile

|  |  |
| --- | --- |
| 1. *Marketing & Social Media Thought Leader* | 1. Project Management and P&L to $365MM |
| 1. Sales Growth / Branding / Global Marketing | 1. Website Design, Marketing, Optimization |
| 1. Channel & Partner Marketing Programs | 1. World-Class Direct Marketing Methodologies |
| 1. Market & Product Financial Analysis & Analytics | 1. Social Analytics, Intelligence, Monitoring |
| 1. Business Development & Sales - $450MM | 1. Systems: Microstrategy, Unica |
| 1. Partner Relationship Marketing (PRM) | 1. Strategic Marketing & Campaign Planning |
| 1. Social Media National Speaker **(see last page)** | 1. Customer Advisory Board Management |
| 1. Marketing Organization Design/Excellence | 1. Customer Excellence/Voice of Customer |
| 1. Customer Management Best Practice Expert | 1. Digital Marketing Expert – SEO, SEM, PPC |

In summary, I am highly accomplished social media, public relations, marketing, client services and CRM executive who has delivered break away brand competitive advantage for clients world-wide.

Thank you for your consideration and I look forward to speaking with you in the near future.

Steven M. Jeffes

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Senior Marketing, CRM, Social Media Executive

Recognized Industry Leader with dynamic career across broad national and international industries, markets, and CRM consulting accounts. Identify and capture CRM marketing and sales opportunities to accelerate expansion, increase revenues, and improve profit contributions. Strengthen brand image, market position, and return on sales. Outstanding record of achievement in complex account and contract negotiations. Accomplished public speaker. Master of Science from University of Pennsylvania & Wharton in Organizational Design & Excellence. Strengths:

* **Recognized Industry Leader** – Named “expert in marketing” by *Reader’s Digest*; Received numerous other letters of commendation from elated Fortune 200 clients over many years..
* **Vision** – Grew $850,000 investment to more than $11,000,000 in incremental revenue by developing new marketing, sales, business intelligence, and Customer Relationship Management (CRM) products and service offerings at PwC.
* **Strategic Planning** – Produced $8,000,000 in annual sales by initiating global business development plans, strategies, models, and field programs at Paradigm (Marketing Automation Software Company).
* **Turnaround –** Led turnaround of ship control system business at Lockheed-Martin with $365,000,000 in sales and annual growth rate of 34% at Lockheed Martin.

# PROFESSIONAL EXPERIENCE

**EdgeUp Marketing – 2003-2006 & 2008-Present.** Marketing, Branding, Customer Relationship Management (CRM), Social Media consulting for Fortune 500 clients. Clients: AmSouth Bank, Radisson Seven Seas Cruise Lines, Home Depot, Intuit Software, Neopost Software, Lenox, Toyota, Hartford, Sepracor Pharmaceuticals.

* Developed a relationship marketing diagnostic for Intuit Software that was responsible for successfully changing the

overall product and service go-to-market strategy for several pilot product lines

* Developed Social Media Best Practice Program Designs for Fidelity Investments, Toyota of America, Hartford Insurance, Capital One, Hanover Insurance, etc.
* Developed a launch plan for a new product for Teva Pharmaceuticals and developed a DTC go-to-market strategy and selected a Relationship Marketing Database Management Vendor for Sepracor Pharmaceuticals.
* Sold a $3MM engagement to AmSouth Bank for the implementation of SAS enterprise marketing automation software

system that included process re-design, CRM change management, and marketing strategy re-design

**Accenture Consulting**, 2006 – 7/2008. 1345 Avenue of the Americas, New York, NY

**Executive – CRM Consulting Practice**. Responsible for selling and delivering multi-$MM marketing, CRM (marketing, branding, sales, communications, public relations), and marketing change management consulting projects involving managing large teams of marketing/CRM delivery practitioners on Fortune 200 client accounts. Publicly held (ACN) global consulting firm with 170,000 employees $18B million in revenues. Sample clients include Best Buy, Federated Department Stores/Macy\*s, Canada Postal Service, American Express, Capital One, Pfizer, Vanguard.

* Successfully orchestrated the global re-engineering of Macy\*s marketing and customer management processes &

organization during the acquisition of the May retail Companies. Architected change led to a substantial decrease in

marketing cycle time simultaneous to increasing marketing lift 5%.

* Designed a new practice offering for Accenture title Marketing Operating Model Excellence that enables companies to

evolve to world-class marketing and CRM capabilities

* Received letter from CEO Bill Green for “thoughtful and impressive” presentation in regard to ideas on how to improve

company operations. Refer to awards: <http://www.stevenjeffes.com/stevenjeffes_awards.html>

**ANSWERTHINK CONSULTING**, Conshohocken, PA, 2002–2003

Publicly held financial consulting firm with 1,100 employees in 12 U.S. locations with $120 million in revenues. Sample clients include Citibank, Verizon, Fannie Mae, Bell South, Mattel, **Bausch & Lomb, Bristol-Myers Squibb**, BISYS.

# Managing Director, Global CRM & Siebel Consulting Practice

Spearhead operations concentrating on practice management, sales and new business development, client projects, and service delivery. Directed strategies, processes, and technology improvements to develop world-class CRM operations for Fortune 100 and Global 400 organizations through the delivery of intelligent business development and marketing programs and improvements. Developed client marketing programs including advertising campaigns, corporate branding, promotions. P&L accountability for $2 million operating budget with delivery on projects to $2MM. 3 direct and 15 indirect reports.

* Drove EBITDA from -2.7MM to +3.3MM by reducing costs, restructuring and targeting more profitable business
* Turned around company by boosting revenues 35%, quarterly, **in 2002** (increased sales pipeline from $2,700,000 to more than $10,000,000 in one year) by increasing lead flow and delivering targeted client “closure” presentations

**PRICE WATERHOUSECOOPERS CONSULTING LLP**, Boston, MA and New York, NY, 1999–2002

High growth international management consulting firm. Clients: First Union**,** TV Guide, AOL, Reader’s Digest, Amex, Pfizer.

# Principal Consultant

Strengthened key selling strategies, including branding, customer segmentation and target marketing. Developed global corporate strategy for integrating marketing and sales effort across multiple operating divisions. Revamped existing client service offerings. Advised C-level executives on marketing, customer management, business analytics, CRM, sales, branding, public relations, acquisitions, and go-to-market strategies. Established strategic partnerships with Enterprise software product firms. Managed multiple client accounts worth $20 million in fees.

* Delivered $50,000,000 in consulting fees and grew market share 37% by delivering client services focused on campaign

and product management, promotions, corporate branding, pricing, and product distribution.

* Captured $11,000,000 in new business by co-developing a “CRM Blueprinting” service offering.
* Delivered large-scale projects centered on Marketing strategy/development, processes and technology solutions achieving

17% Return On Sale

* **Pioneered PwC’s Pharmaceutical Direct to Consumer Practice by architecting marketing and direct to**

**consumer (DTC) solutions for Pfizer, Bristol-Myers Squibb and Astra-Zenica**

**PARADIGM COMMUNICATIONS**, Tampa, FL, 1997–1999

Privately held start-up **marketing software and services firm** specializing in marketing, marketing software, logistics, distribution, and advertising with 100 employees, 3 locations, and $20 million in revenues.

# Vice President, Operations and Co-Founder

Launched production on one of the first **marketing automation systems** in the US that became an industry benchmark. Steered strategic planning, corporate vision, and operations. Authored business plans, established corporate infrastructures, recruited senior team, negotiated financial and legal agreements. Oversaw staffing, operations, marketing, software development, field support and logistics, customer service and support. Managed sales pipeline, compensation plans and measurement and tracking of sales performance. P&L oversight of $3 million budget. 4 direct and 40 indirect reports.

* Earned “leader” product ranking from Garner for new “marketing automation” product category
* Grew market share 100% by developing a robust reseller and marketing network of Tier 1 and Big 5 consulting firms

**UNITED TECHNOLOGIES CORPORATION**, Carrier Division, Syracuse, NY and Farmington, CT, 1995–1997

Manufacturer of building, commercial and residential air management and refrigeration systems with operations in 171 international locations and 2.5 million sq. ft. of facilities, 45,000 employees and revenues of $8.9 Billion

# Operations, Project & Corporate Information Director

Challenged to direct largest sales force reengineering project attempted by any U.S. company. Directed operations, manufacturing, sales and marketing, e-commerce, training, enterprise data warehousing, data management, human resources, MIS/IT, purchasing, finance, and sales force automation. 15 direct reports and 1,487 indirect reports with P&L responsibility for $5 million budget.

* Drove higher sales volume of $92,000,000 and enhanced return on sales of 17% by transforming marketing and sales

operations of multi-channel distributors.

* Boosted sales more than $48,000,000 with 360 distributorships in one year, in a declining market, by identifying processes

and tactics that enhanced sales closure rates.

* Recipient of Distinction Award from Division President for innovation and achievements in design, development and

deployment of marketing and sales systems, processes, and products.

**LOCKHEED-MARTIN**, Multiple Locations, 1988–1995

Publicly traded multi-national manufacturer of products and services including aircraft, spacecraft, and launch vehicles to missiles, electronic, information systems, and energy management. General Electric Aerospace sold to Martin Marietta who was bought by Lockheed-Martin. Clients included U.S. Military, CIA, NSA, GSA, US DOD.

# Senior Engineer / Program General Manager

Led high-volume DOD operations for the manufacture of advanced control/sensor/information systems and technologies. Acquired French software company. Spearheaded global technology innovations designed to enhance the engineering process. P&L responsibility for $365MM budget. Managed 8 direct and 400+ indirect reports.

* Brought in $822,000 in new revenues in one year by launching new technology business for leading edge software to

optimize and automate operations.

* Slashed project/product completion cycle time 38% while improving quality 50% by reengineering global engineering and

business operations with new methodologies and processes.

# EDUCATION

MS in Organization Change Dynamics, University of Pennsylvania, Philadelphia, 1985, 3.8/4.0 Overall GPA

BBA in Computer & Information Services and Finance, Temple University, Philadelphia, 1983, Major GPA - 3.9/4.0

GE Crotonville, Sponsored by management to attend numerous Executive / Management Development Courses, 1988-1995

Licensed New York Insurance Underwriter in Accident, Health, and Life Insurance Lines, 7/2003

**Speaking / Media / Published Books**

* Merck Pharmaceuticals, November 2011, Effective Social Media usage in the Pharmaceutical Industry
* Guilderland Chamber of Commerce – “Utilizing LinkedIn for Business”. September 9th, Albany, NY.
* New York State Association of CPAs – “**Effective Social Media for CFOs and CPAs**.” May 2011, Albany, NY
* American Marketing Association, “**Effectively Leveraging LinkedIn for Business Success: Campaigns, Leads, Sales, Marketing**.” May 2011, Albany, NY
* Excelsior College – “**Effectively Leveraging LinkedIn for Career Success – Finding Jobs, Effective Personal Branding, Career Management**”. Feburary 2011, Global Webinar
* Virginia Bankers Association – “**Social Media in Banking & Financial Services**”. 3/7/2011, Charlottesville, VA.
* New York Bankers Association – “**Social Media for Prospecting and Customer Loyalty**”. 9/24/2010, Albany, NY.
* Excelsior College – “**How to Develop Your Social Media Personal Brand for Career & Professional Success**”. 7/30/2010, Virtual Webinar to Students/Faculty Across the Globe.
* Albany, NY Ad Club. "**2009 Ad Club Annual Meeting and Social Media Panel Discussion** ". 6/30/2009. Social networking tools and how to leverage these tools into effective media campaigns.
* Albany, NY Consulting Alliance. "**Social Networking and Beyond – Converting Social Networks into Business Opportunities**". 6/12/2009. Are you lost on LinkedIn?  Turned your nose up to Facebook?  Let Steve Jeffes, CEO from EdgeUp Marketing help you to traverse the world of Social Networking.
* National Chapter of American Society for Quality (ASQ) 5/2008, keynote speaker on developing highly successful change management programs. Program was highly successful and was placed on regular speaker/invite back list.
* Authored an article for the Siebel Observer titled “Know your Siebel 7 Upgrade Options (1/2003)” while the Global CRM leader at Answerthink. <http://www.b2bworkforce.com/industry/siebelobserver/jan20issue2003.htm>
* CRM Magazine and CRM.com, 2002. "Vrrroooom - How companies can rev up rules engines   
  to drive up profits."  Except: *"CIOs are keenly aware of what value these rules engines can bring,"* *says   
  Steven Jeffes, a CRM practice director at PricewaterhouseCoopers (PwC).*
* National Center for Database Marketing (NCDM) Orlando, FL, 08/30/2002.  “Zeroing in on Key   
  (CRM) Implementation Issues”
* National Center for Database Marketing (NCDM) Orlando, FL, 12/11/2001.  “Assessing Your   
  Organizations CRM Strengths and Weaknesses”
* National Center for Database Marketing (NCDM) Orlando, FL, 12/04/2000. “Migrating through the four (4) Quadrants to an e-customer company”. This speech netted the following outcomes: Twenty eight (28) qualified leads from an audience of over 80 SRO members, Approximately 30% of the audience commenting that this was one of the best presentations they had ever seen. Invited to present PwC’s “Market Intelligent Enterprise (MIE)” CRM solution methodology to three Fortune 100 companies.
* PricewaterhouseCoopers LLP, global ECM practitioners and partners, Bethesda, MD, 10/25/1999. “The state of the ECM practice and the ECM marketplace”. Over 100 PwC partners and managers attended conference from all continents.
* Author of the best selling book titled “Appearance Is Everything” (1998) that is being sold internationally, has been featured by programs like ABC and Fox News, is held by major libraries like Columbia/Yale/Princeton, and is suggested Psychology/Sociology reading at several US Universities
* Served as director or media and public relations for a large not-for-profit in Central New York. Developed significant press releases, fielded numerous media interviews, and built an array of synergistic alliances to enhance the message, presence, brand, and viability of the organization.
* Served as the spokesperson for several high technology companies at investor and analyst meetings to position company strategies, visions, and value propositions to instill company confidence within the investment community

Security Clearance - Held a U.S. DOD SECRET Clearance (presently Inactive).