



## SUMMARY OF QUALIFICATIONS

Accomplished service-sector executive with deep strategy, marketing and analytics experience to generate results. Strong communications, problem solving and influence skills.

## PROFESSIONAL EXPERIENCE

**Capital District Physician's Health Plan**, Albany, NY 2019 – Present  
*Director, Consumer Engagement*

- Leading the team responsible for engaging 400,000 members in health plan benefits and services, while attracting prospective employer group customers and new members through innovative health and wellness programs.
- Developed and led multi-channel marketing plans to reach targeted customers for each program; introduced new calling campaigns and virtual event programming to increase enrollment rates, which exceeded forecasts by 10-35%.
- Launched seven new programs; negotiated over \$5M in cost savings; oversaw all aspects of the consumer experience.
- Conducted market research, vendor assessments and data analysis to inform product and marketing recommendations.

**Regan Dynamics, Inc.**, Schenectady, NY 2018 – Present  
*Chief Executive Officer*

- Founded boutique strategy and marketing consulting firm to help service organizations expand their reach.
- Advised local and global clients in the financial services, healthcare, information technology and non-profit sectors.

**Adirondack Health Institute (AHI)**, Glens Falls, NY 2017 – 2018  
*Executive Director*

- Led the Communications, Community Engagement, Workforce and Enrollment teams, which served 100+ hospital, provider and community partners to improve care for 145,000 Medicaid members in nine counties.
- Responsible for business-to-business and direct-to-consumer marketing to promote services and cultivate supporters.

**MVP Health Care**, Schenectady, NY 2008 – 2017  
*Senior Leader, Customer & Member Experience (2014 - 2017)*

- Promoted to a new customer experience leadership position based on track record as marketing director.
- Led the Communications, Customer Relationship Management and Process Improvement teams to optimize customer interactions and communications across channels, while reducing customer calls and complaints.
- Launched a Voice of the Customer program and integrated multiple data sources for real-time performance monitoring.

*Director, Marketing & Commercial Business Development (2008 - 2014)*

- Chief architect of marketing strategy for commercial product line representing \$350M in revenue and 650,000 members across all segments. Managed team of professionals as well as consultants and agency partners to deliver results.
- Responsible for marketing plans, product positioning, digital marketing, collateral, advertising and market research.
- Launched a direct marketing unit to support a new direct sales channel. Implemented Salesforce to automate lead flow, sales activity and analytics. Developed lead scoring and targeted campaigns with response rate of 1.9%.
- Designed and recruited a new digital marketing team and launched new capabilities such as instant online quoting and product comparison tools for brokers, employers and consumers.
- Responsible for strategic partnerships to enhance product offering and expand distribution channels.

**Charles Schwab & Co., Inc.**, San Francisco, CA 2000 – 2008  
*Managing Director, Client Experience Marketing (2002 – 2008)*  
*Director, Retail Strategy & Implementation (2000-2002)*

- Promoted to new marketing leadership role after successfully developing new service offerings and managing an aggressive national rollout that exceeded sales forecast.
- Responsible for revenue plan and expense targets for six fee-based advice services, including the Schwab Private Client™ brand with \$50B assets under management and 55,000 enrolled clients.
- Led dedicated marketing team, consultants and agency partners to deliver all aspects of the customer experience for these six segments including pricing, market research, marketing communications, and field training.
- Developed and implemented marketing strategy across live and digital channels to drive growth, product cross-sell and customer engagement. Managed \$10M budget to drive new enrollments, which exceeded sales plans by 5%.

**Deloitte & Touche, LLP**, San Francisco, CA  
*Manager, Management Solutions Practice*

1998 – 2000

- Responsible for sales and service delivery of account teams focused on strategic planning, performance improvement and information technology initiatives for clients ranging from Gap Inc. to high technology startup companies.

**Ernst & Young, LLP**, St. Louis, MO & San Francisco, CA  
*Senior Consultant, Management Consulting Practice*

1995 - 1998

- Led strategic assessment, post-merger integration and system implementation projects for Fortune 500 clients.

## EDUCATION

**Union Graduate College**, School of Management, Schenectady, NY  
 Graduate business coursework in leadership and marketing.

**Washington University**, John M. Olin School of Business, St. Louis, MO  
 Master of Business Administration with a concentration in marketing. Studied abroad at London School of Economics.

**Washington University**, College of Arts & Sciences, St. Louis, MO  
 Bachelor of Arts *cum laude* with dual majors in english and history.

## CERTIFICATIONS

**Certified Digital Marketing Professional, v9.0**, Digital Marketing Institute, 2023  
**Professional Certified Marketer (PCM®)**, American Marketing Association, 2023  
**Marketing Strategy Certification**, American Marketing Association, 2022  
**New York State Woman-Owned Business (WBE)**, Empire State Development, 2020  
**Managed Healthcare Professional (MHP)**, Health Insurance Association of America, 1997

## VOLUNTEER EXPERIENCE

- **Niskayuna Community Foundation** – current board member; current volunteer for strategy and communications.
- **Women’s Employment Resource Center** – former board member; current volunteer for mentoring and marketing.
- **American Marketing Association** – served on the local chapter’s board of directors; launched mentor program.
- **Regional Chamber Women’s Business Council** – served as the Chair, Vice Chair and Communications Lead.
- **Girl Scouts** - served on the local chapter’s advisory board; launched new service line for high school students.

## PERSONAL

- Enjoy writing, Pilates, tennis, cooking and travel, including visiting all 50 of the U.S. states.