

Sally A Smith

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SUMMARY

Seasoned communications professional. Specialize in developing relevant, effective, consumer friendly marketing and communications strategies for complex products with an emphasis on ROI. Experienced in all facets of marketing communications. Strong business partner and consensus builder, with demonstrated leadership abilities, and cost effective, quantifiable results.

Brand Steward to protect and ensure consistency

Oversight of all internal and external communications to ensure consistency of messaging and tone, including content management, advertising, PR, digital, events, sales support. Responsible for agency selection, oversight and management.

Message Development to influence Customer Needs Throughout Buying Journey

Developed messaging strategy to ensure communication/articulation of brand position. Identified, developed and managed content across enterprise, by LOB and across all channels including digital, advertising, PR, video, sales support and internal communications

Market Research to Understand Satisfaction and Identify Gaps

Launched benchmark customer satisfaction study for Wealth segments: Wealth management, registered investment advisory and retirement plan services teams to determine net promoter scores, client satisfaction regarding product and service delivery. Managed outside resource and collaborated with operations, data warehouse and sales team to collect and validate data pre launch.

Catalyst to Build Teamwork and Break Down Silos

Managed team of 8 including marketing, PR, digital communications, website, graphic design and production. Strategic change agent: Rebuilt marketing team and initiated planning through consensus building in highly matrixed organization. Identified key areas of customer opportunity/risk for newly recapitalized Johnson Financial Group. Significantly improved employee engagement scores (now some of the highest in the company). Managed all communications for conversion/integration of \$2B merger for Harris Bank's introduction to the WI market. Mentored key business units in identifying metrics and goal development. Fueled efforts on behalf of sales and operations in product development for business banking and retail.

Event Management To Enhance Business Development Efforts

Developed speaker programs for Commercial Banking and Insurance, including recruitment and coordination of speakers/presentations, event promotion, scripts for sales staff, list generation, pre-and post-event initiatives. Garnered turnouts of 50-100 attendees. Planned/implemented speaking engagements for Chief Investment Officer across 8 regional markets in WI and AZ.

Advance Work for Retail Expansion

Developed communications plan for pre- and post-launch activities, including advertising, digital, promotions, and events. Established sales approach to new markets via proactive community outreach. Collaborated with select LOBs to identify civic leaders to discuss possible community partner role.

Community Relations & Strategic Partnerships

Identified strategic partnerships within key communities. Resulted in exceptionally beneficial relationships for sales force. Partnerships established with major nonprofit, including community high school, university, homeless shelter, various municipalities, Chambers of Commerce, and symphony orchestra. Developed integrated sponsorship programs and joint promotions. Coached multiple business units to leverage these relationships. Developed media Sponsorships with major metro print and broadcast organizations. Additional major community sponsorships include FOX6 “Coats for Kids” and United Performing Arts Fund (UPAF) “Ride for the Arts”. Also responsible for oversight of annual United Way Campaign for Johnson Financial Group.

Invested Capital to Reduce Costs and Add Value

Led strategic initiative to revamp proprietary signage program to LED technology for retail network. Resulted in: significant cost savings, increased efficiencies, flexibility to tailor promotional messages to discrete branch locations, control over appearance and regulatory compliance, and enhanced community outreach. Led and managed all zoning appeal processes in over 15 markets, working in concert with Village Leaders/Zoning Boards. Collaborated with village leaders in revising their signage codes. Collaborated with IT, operations and fixed assets to bring printing of all promotional materials in house, resulting in cost savings of thousands of dollars.

Enhance Sales Production and Decision Analytics

Designed and implemented precursor to CRM system in collaboration with IT partners and sales team for telemarketing initiatives. System provided digital access to management reporting, electronic delivery and updates of call lists, call history, scripts, comments and calendar. Mapped customer penetration pre/post campaigns using geocoding. Designed ongoing reports to track campaign progress.

PROFESSIONAL EXPERIENCE

JOHNSON FINANCIAL GROUP-RACINE, WI
SVP Marketing

October, 2011-Present

Oversee all communications for Johnson Bank - the largest privately held bank in WI, and Johnson Insurance, one of the largest insurance agencies in WI.

Harris, N.A., Wisconsin (Now BMO Harris Bank)
VP, Marketing District Manager

2008-2011

Key communications lead for \$2B merger of 7 community banks, spanning Southern WI. Member of Leadership Team for Milwaukee Region, dotted line reporting to SVP Retail, MKE. Oversaw marketing/communications for pre-post merger. Key communications liaison between WI Leadership Team and Harris Chicago.

Park National Bank (A subsidiary of First Bank of Oak Park-closed, 2008)
SVP, Director of Marketing

2007

Planned/developed strategic communications/positioning for this newly formed bank, created from a 5 bank merger

First American Bank-Elk Grove Village, IL
Vice President, Marketing Director

1996-2006

Oversaw marketing communications during major expansion of the bank's footprint; the bank more than doubled its presence from 19 to 44 branches, and increased assets from \$1B to \$2B.

ADVERTISING AGENCY EXPERIENCE

Lou Beres and Associates
Michael Meyers and Associates - Account Supervisor
Tassani Communications - Account Director
J. Walter Thompson - Account Supervisor
E.H. Brown Advertising - Account Supervisor

Clients

Discover Card Financial Services
The Principal Financial Group
Kemper Property and Casualty Insurance

EDUCATION

Loyola University of Chicago-MBA, Marketing
Rockford College-BA
Chicago Botanic Gardens - Certificate in Ornamental Plant Materials

COMMUNITY INVOLVEMENT

- North Center Neighborhood Association/Compassion In Action Subcommittee
- United Way of Greater Milwaukee-Women's Leadership Council (2012-Present)
- St. Clement's Parish, Chicago:
Jesse Tree Project: Volunteer, Past Chair, Team Lead - Annual fundraiser, raising over \$20K/year, distributed to 10-15 Chicago Area charities
Parish Council - Past member and Chair
Search Committee Member: Director of Community Involvement, Grade School Principal
- Health Charities of WI Past Board Member (2013-2015)
- Better Business Bureau-WI-Chair BBB 2011 Business Ethics Torch Awards; Planning Committee Member 2015, 2016
- Beverly Arts Center - Past Board Member

ACTIVITIES/INTERESTS

Golf, Travel, Garden Design