Joe Jobscan

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SUMMARY

- Seasoned executive with 15+ years leadership experience in highly visible and impactful strategic initiatives for executive leadership across the financial services industry and Fidelity's Personal Investing, Workplace, Health & Welfare and Asset Management businesses
- Collaborative & data driven leader with management experience delivering increased revenue, efficiency, and cost reduction with a tested ability of influencing and aligning business leaders and executive sponsors
- Builder of strong relationships to identify and grow organizational strengths while remedying weaknesses
- Proven leader with a focus on business strategy, product management, marketing, operations, sales strategy, product pricing strategies and management consulting driving continuous improvement and large-scale change management
- Series 7 & 24, Tableau, QlikSense, Agile Methodology, JIRA

EXPERIENCE

USA Investments **Seattle, WA** **08/2009 – 03/2020**

Vice President (VP) of Strategy ***03/2017 – 03/2020***

- Data driven leader of strategic planning and growth initiatives identifying market intelligence and opportunity, operational inefficiencies, investments, and growth impact for Fidelity's $3.1B Workplace Investing, Health & Welfare businesses globally
- Day to day director of cross functional team of 10, including Sales and Marketing, Operations, and Finance, evaluating strategy for growth and overall business plan in the Defined Benefit market, a $2.1T opportunity
- Recommendation recognized as a "Big Play" initiative for the firm's growth strategy to capture market share and increase revenue by $200M across Fidelity's enterprise businesses
- Spearheaded go-to-market rollout of Defined Benefit business, including organizational design, value proposition, sales strategy including sales training, CRM, KPI development, reporting, and governance as well as the long-term roadmap

Vice President (VP)– Executive Services Product & Offering Development ***05/2015 – 03/2017***

- Responsible for overall product strategy Fidelity Executive Services, a premier financial planning and wealth management offering for corporate executives of Fortune 500 clients
- Grew client base by 150% over 2 years as product line leader responsible for product marketing, sales, client onboarding, operational execution and multiyear product roadmap for key offering designed to help customers with complex wealth planning & retirement needs
- Managed the product life cycle and defined the wealth management and financial planning process, customer service and marketing experience to deepen client engagement
- Produced highest client retention (98.9%) and engagement in the firm through data analytics *(Tableau)* of customer and market data to develop marketing acquisition strategies to enhance customer engagement across numerous customer segments and needs
- Led sales distribution operations, including sales forecasting, sales goals, reporting, as well as a client onboarding team of 3, responsible for exceeding performance standards by delivering world class experience to Fidelity's corporate clients; NPS of 80 for the product

Director – Internal Management & Strategy Consulting ***04/2012 – 05/2015***

- Day to day project lead for internal strategy consulting projects conducted for cross enterprise and the business unit leadership
- Delivered large scale change management projects by conducting impactful analyses including market scan, competitor research, customer analysis and segmentation, and financial modeling to evaluate growth and scale opportunities
- Managed teams of 2-5 associates at the management consultant and consulting analyst levels; responsible for workstream delivery, mentorship, and career development

- Redesigned the organizational structure for Fidelity's enterprise technology organization to align business objectives and address rapidly changing technology landscape; identified a "plan, build, run" strategy that aligned resources and technology architecture and capabilities to customer need
- Organizational strategy enabled Fidelity's $780M technology budget to cut $100M in cost over 5 years; ~13% decrease
- Led design sessions and final recommendation presentation with audience of 25+ senior executives

Director – Capital Markets Trading Product Management ***02/2009 – 04/2012***

- Managed a $15M+ electronic equity trading technology portfolio and cross functional business and technology teams through business requirements, technology design, quality assurance testing and implementation of system enhancements
- Responsible for leading large-scale technical change management to enable global execution capabilities for retail and institutional clients

American Consulting Inc. **Seattle, WA** **04/2006 -01/2009**

Senior Consultant - Capital Markets Consulting

- Conducted operational effectiveness assessments to streamline operations, increase efficiency, reduce risk, and cost by identifying process and technology improvements, quantifying impact and identifying resolution roadmaps
- Led assessments of federal regulations to identify risks in compliance mechanisms for maintaining regulatory compliance

EDUCATION

University of Nebraska, Lincoln, NE **08/2001-07/2005**

Bachelor of Arts (BA) Economics