

MARK GOOLEY
markgooley@yahoo.com

EDUCATION

1993-1995

**J. L. KELLOGG GRADUATE SCHOOL OF MANAGEMENT
NORTHWESTERN UNIVERSITY**

Evanston, IL

Master of Management degree, *with distinction*, June 1995. Majors in finance, management and strategy, and organizational behavior.

- GPA 3.95/4.00, *Dean's List*. Beta Gamma Sigma
- Member, Northwestern Men's Volleyball Team

1986-1990

UNIVERSITY OF CONNECTICUT

Storrs, CT

Bachelor of Science, *summa cum laude*, May 1990. Degree in finance with concentrations in computer science and real estate finance.

- GPA 3.80/4.00, *Dean's List*, Beta Gamma Sigma
- Outstanding Finance Student Award, 1990
- Real Estate Finance Department Teaching Assistant (one of only two undergraduate TA's at UConn)

EXPERIENCE

2005-2008

FIDELITY INVESTMENTS

Marlborough, MA

Personal Wealth and Investing Business Unit (formerly Fidelity Employer Services Company (FESCO))

Vice President, Finance

- **Client Billing System Replacement** – Successfully made business case to replace the aging Client Billing System, which is used to bill ~\$1.5B annually. Secured business resources and \$3M in technology funding in a very tight funding environment. Led ten person business and technology team to evaluate vendors and in-house development – a contentious process, review proof of concept and gap analysis. Contracted with and began implementation with selected vendor.
- **Strategy Map** – Led team of five to develop 'strategy map' for the FESCO finance function. Normally used for businesses or business units we used the strategy map to articulate, integrate and gain consensus on the finance function's vision, objectives, services and measures. Work was featured at annual "All Hands" meeting.
- **'Guardian' Workflow System** – Worked with internal technology development team, Client Billing group, and Finance and Operational leadership to standardize and automate workflow to review, approve/reject and report on client waivers, write-offs, and billing adjustments. Previous e-mail- and Excel-based process was risky, time-intensive, and provided little visibility at business and client levels. Success of first phase led immediately to expand application to other workflows such as allowing billing without a finalized contract and adherence to performance guarantees.
- **Reporting enhancements** – Commissioned and oversaw system analyst review of current reporting usage and associated downstream "massaging". Prioritized largest potential improvement areas and allocated development efforts. For example, the "Infopac Scrubber" enhancement saved approximately 4000 hours per year by automating previously manual report running, consolidation and comparison work.

2001-2004

LIBERTY MUTUAL GROUP

Boston, MA

Corporate Strategy and Research Department – an internal strategy consulting group

Principal (2003-2004), Managing Consultant (2001-2003)

Led consulting project teams for various Strategic Business Units (SBU's). Illustrative projects:

- **Operational improvement – Claims operation** – Identified \$30+M in annual cost savings through structural, process and systems improvements. Some examples: 'Virtual office' claims aggregation, reduce IT system delays, office relocation, workflow changes.

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- **Expense Benchmarking** – Benchmarked Liberty financial performance versus competitors to identify opportunities available for improvement. Findings in excess of \$200M (by SBU by line by cost category) used to help CEO set performance targets for 2005.
- **Operating Model Review** – Led eight consultants and approximately fifty clients to explore opportunities to adjust operating model of one of Liberty's four key SBU's. Strategic and tactical recommendations included reorganizing significant portions of the SBU, undertaking a major data mining program and revising roles between regional companies and home office.
- **Internet 'Roadmap' for Personal Market SBU** – Prioritized technology development for Liberty's Personal Market internet offering. Identified customer needs, competitor offerings. Assessed self-service complexity and business risk to Liberty. Prioritized strategically 'reasonable' initiatives based on cost-benefit.
- **Liberty International Underwriters (LIU) value proposition** – Identified key customer decision criteria, mapped LIU position versus competitors and determined attractive 'white space' (and necessary business changes) to improve positioning.
- **Hong Kong Growth Opportunities** – Performed market assessment, competitive positioning and identified short and long-term growth opportunities for Liberty Hong Kong.
- **Customer Retention** – Identified opportunity to increase retention (\$12M year one increasing to \$33M year five) for Business Market SBU without substantially changing current processes by sending unwanted lines of desirable accounts to partners. Evaluated potential partners, created new business rules and identified specific applicable customers for pilot program.

2000- 2001

EPESI TECHNOLOGIES

Allston, MA

An internet services company that syndicated interactive applications

Vice President of Business Development

- Worked with CEO and CTO to develop and articulate company value proposition and customer/market segmentation. Created and refined sales presentations for different customer segments.
- Developed sales pipeline and closed Epesi's first ten customers including a MediaMetrix Top 20 destination site, the leading sports nutrition e-tailer (profitable), and two b2b application providers.
- Created content for website and brochure. Brought "voice of customer" to engineering to generate product requirements and functional specifications.
- Member of senior management team. Hired, trained and managed three person staff.

1999-2000

SOURCEGATE SYSTEMS

Burlington, MA

SourceGate provided a system to let ISP's diversify their revenue sources to include advertising and e-commerce.

Director of Business Development & Product Manager

Business development highlights:

- Initiated and negotiated partnerships with numerous content and functionality providers.
- Worked with CEO to define, negotiate and implement strategic partnership with internet advertising agency. Originated distribution discussions with major credit card issuer.
- Primary author, company sales presentation.

Product management highlights:

- Designed and articulated new feature and functionality set for product.
- Originated and led prioritization process for product features and software development activities. Led user interface design and testing.

1995-1999 &
Summer 1994

THE BOSTON CONSULTING GROUP

Boston, MA

A premiere international strategy consulting firm

Project Leader (1997-1999), Consultant (1995-1997)

Managed BCG/client teams on large-scale strategy and process improvement projects. Focused on developing and evaluating new business opportunities. Illustrative projects:

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- **Profit and growth opportunities/Organization redesign – \$1B Consumer Goods Company** Led client/BCG team to increase profitability and strengthen brand positioning of Sporting Goods businesses. Identified additional \$60M sales/\$10M profit in first year growing to over \$100M sales/\$20M profit in fifth year by targeting new customer segment, deepening assortment and developing alternative channels. Led client/BCG team to develop new organization structure, key processes, measures, and incentives. New design put greater emphasis on entrepreneurship and profitability and increased merchandising effectiveness.
- **New Business Opportunity – Paper Company** – Changed clients view of “turn-key” recycled newsprint mill deal from ‘go’ to ‘no go’, based on analysis of customer needs, pricing, competitive position, security of fiber supply and deal terms.
- **Channel Strategy – Group Health Insurer** – Assessed sales distribution strategy for small groups (<300 employees). Identified opportunities to increase market share by reducing coverage gaps and tightening link between sales representatives and agents.
- **Inventory Reduction – Pharmaceutical Company** – Reduced raw material, work-in-process and finished product inventory across multiple products. Codified process to allow company to extend efforts to other products.
- **Business Review/Technology Assessment – Computer Company** – Determined profitability by product line and geography as part of strategic review. Developed competitive assessments and business plans for promising object-oriented database and repository technologies.
- **Process Redesign – Hydroelectric Turbine Manufacturer** – Led client team to redesign offer-to-order processes to reduce time to quote, financial exposure from performance guarantees and ‘hand-offs’ upon order.

1991-1993

THE GENERAL ELECTRIC COMPANY

Plainville, CT & Rio Piedras, Puerto Rico

Electrical Distribution and Control Business

Financial Management Program, various analyst positions. Select accomplishments:

- Teamed with senior manager to provide business-wide pricing and market share info and analysis. Increased productivity 50% via process improvements and automation.
- Supervised transition of GE Accounts Payable Operation (150,000 invoices per year) from Puerto Rico to Florida. Transition occurred ahead of schedule and was problem-free.
- Designed and implemented activity-based costing model for residential circuit breakers. Results drove pricing decisions for manual and automated lines.
- Reduced scrapped-in-field expenses 25%. Received Quest for Excellence award for outstanding customer service.
- Received National Honors twice and Honors twice.

OTHER

Avid skier and volleyball player. Excellent at home demolition, rebuilding skills less proven.