



# Kelly Wilson

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7 Hilary Way  
Orinda CA



## Education

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**YALE**

**UNIVERSITY**

M.B.A., 1994 –  
Strategy Emphasis

**UNIVERSITY OF  
CALIFORNIA, BERKELEY**

B.A., 1988 –  
English and Mass  
Communication  
Double Major

**HARVARD**

**UNIVERSITY**

Leadership  
Program 2017

## Academic Involvement

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**ST. MARY'S COLLEGE**

Adjunct Professor  
of Marketing at Graduate  
School of Economics and  
Business Education  
2014 - Present

## Professional Profile

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Senior executive with 25+ years of experience in marketing in consulting and industry roles including Partner/Principal, Chief Marketing Officer and SVP spanning marketing strategy, customer experience, sales enablement, integrated marketing, analytics, digital, product development, content marketing and operations. Exceptional creativity, “storytelling” abilities and team leadership skills.

## Employment History

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**ERNST & YOUNG, 2014 - PRESENT**

**Principal, Strategy and Performance Improvement**

Global Client Services Partner for global accounts, San Francisco People Engagement lead for 400+ person advisory practice. Representative engagements:

- **Future of Marketing Strategy** – Created a future vision and roadmap for how a bank’s marketing organization should evolve capabilities and technology to create better client experiences and sales enablement over a five year horizon
- **Digital & Software-as-a-Service Product Strategy** – Evaluated concepts and defined commercialization requirements for digital and SaaS offerings
- **Enterprise Sales Enablement** – Launched mobile sales platform with greater personalization and quantitative framing along with social selling training
- **FinTech Disruption Strategy** – Sized opportunities to serve Millennials, students and the un(der)banked via wearables, mobile apps and social payment products

**McKESSON CORPORATION, 2011 – 2014**

**Vice President, Marketing Communications**

Led marketing for \$100 billion US Pharmaceutical Business, largest US drug distribution company, 14th on Fortune 500 list. Representative accomplishments:

- **Integrated Marketing Strategy & Execution** – Led segmentation, targeting, value proposition development, campaign management, revenue marketing, media relations, events, digital, social and content marketing
- **Sales Force Enablement Strategy** – Enabled revenue lift of 11% above plan by focusing on quantitative selling and launching mobile enabled tools
- **Customer Experience Strategy** – Drove 27% lift in net promoter score via a digital customer community, Innovation Center and conference redesigns

**PARADIGM MANAGEMENT SERVICES, 2008 – 2011**

**Chief Marketing Officer · SVP, Product, Marketing and Corporate Strategy**

Responsible for corporate strategy, marketing, and product development for a market-leading healthcare services business. Representative accomplishments:

- **Sales and Marketing Strategy** – Increased sales by 23% and market awareness by 37% through improving sales enablement and product mix
- **Social Media Strategy** – Drove customer engagement (63% interacting monthly) by launching a social platform, webinars, Twitter and a blog

## Professional

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Leadership  
Committee,  
2020 Women  
on Boards

Regular  
Conference  
Speaker at  
Money 20/20,  
NACHA,  
American Banker's  
Mentor Factor  
Women's  
Conference,  
and Source  
Media's Card  
Forum

## Community

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Volunteer for  
Habitat for  
Humanity,  
Miramonte,  
Glorietta,  
OIS, and  
The American  
Red Cross

## Professional Profile

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### **BLUE SHIELD, 2007 - 2008**

#### **Head of Business Marketing (Individual, Small Group, Mid/Large, Dental, Life, Vision, and Medicare)**

Responsible for leading the \$18 million, 26 person centralized marketing organization. Key accomplishments:

- **Direct Acquisition Marketing** – Achieved 124% of sales plan for Individual Family Plan business and 147% of sales plan for the Medicare business through direct mail, telemarketing, direct-response TV, and online key word, banner, and search engine optimization (SEO)
- **Broker Acquisition Marketing** – Increased sales from the agent/broker channel by 18% through new co-op and producer marketing programs

### **WELLS FARGO, 2003 - 2006**

#### **Senior Vice President, Strategy & Marketing, Private Client Services**

Led 54 person centralized marketing group for private banking, brokerage, insurance, trust and investment management for the \$160 billion Private Client Services division of Wells Fargo. Key accomplishments:

- **Brand Strategy Development** – Linked the brand strategy to the business strategy, and rolled out new positioning, visual identity system, and collateral
- **Partnership-Based Marketing Strategy** – Partnered with Wells Fargo Retail Bank to bring in \$6.3 billion in assets in a three month period and \$800 million in Business Retirement assets (a 158% increase)
- **Product Growth & Profitability Strategy** – Grew loan portfolio to \$10.5 billion, a two-year 35% increase, with profitability lift of 16% by introducing new products and improving field support

### **ACCENTURE, 1995 - 2003**

#### **Partner, Strategy Practice**

Led client engagements in marketing strategy, product development, customer value management, and sales effectiveness. Key accomplishments:

- **Payment Strategy Engagements** – Led multiple payment strategy engagements for banking and global payment companies focused on increasing revenue growth, and enhancing profitability
- **Top Line Revenue Growth** – Brought in five new clients in four years and sold consulting and outsourcing services in excess of \$196 million
- **People Management** – Served as the "Western Region People Lead" for a 250 person practice, led the diversity and female mentoring programs. Received three internal awards for employee development.

### **MCCANN-ERICKSON Advertising & Public Relations, 1989-1992**

#### **Senior Account Executive**

Responsible for new business development and account management including financial oversight/account profit and loss, strategic planning, and campaign development and execution.