

# MARC MENDELSON

Business Strategy, Transformation & Customer Experience Executive

## CLIENT DELIVERY EXPERIENCE

This document contains an overview of the clients that I worked with in my career, as well as some details to each of the projects.

## BUSINESS STRATEGY

- **Bank of America — Paycheck Protection Program (2020)**  
Marc brought operational rigor, accuracy, and efficiency to time-sensitive deployment of \$140M in Paycheck Protection Program (PPP) loans. (top-5 retail bank). Directed and mentored project team ranked in top 3 out of 20+ teams for quality and efficiency, consistently meeting and frequently exceeding project goals.
- **KPMG — Inclusion & Diversity (2019)**  
Marc was actively engaged in the firm's Inclusion & Diversity efforts by serving on the leadership board of the Business Resource Groups charged with increasing the hiring and advancement of those with disabilities, members of the LGBTQ+ community, African Americans, Asian Pacific Islanders, Hispanics and Veterans - all which are key constituencies that are underrepresented at the firm.
- **KPMG — Audit of the Future (2018)**  
Marc focused on several internal initiatives with KPMG's Audit leadership. Through the development and facilitation of Design Thinking Labs, he identified opportunities for the Audit of the Future and better internal communications. The solutions included the introduction of automation, organization redesign, improved workflow and effectual measures.
- **TeleTech — Integration of Disparate Companies (2015-16)**  
Marc was responsible to coordinate the integration of five disparate companies acquired by TeleTech (Peppers & Rogers Group, rogenSI, iKnowtion, Guidon, and Innovative Learning) to form their new consulting practice. He worked with leadership across North America, Europe, the Middle East and Asia Pacific to drive uniformity in areas of client focus and delivery.



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- **Genpact — Business Process Outsourcing (2014-15)**

Marc served as a Lead Solution Architect and Subject Matter Expert for a major Business Process Outsourcing company, building Customer Experience solutions. by leveraging multi-channel optimization strategies and technologies.



- **Exelon — Digital Channel Strategy (2014)**

Marc led an internal and client team responsible for the development of a digital channel strategy for several regional utility operating companies (under a single parent corporation) to converge strategies and technology - covering Customer Operations, Communications, IT on their web, mobile, email, text messaging, IVR, outbound dialer, and social media channels. He and the team developed a multi-year roadmap and governance structure supported by a self-funded business case.



- **Diageo — Corporate Strategy Assessment (2010)**

Marc reviewed the marketing organization of a major spirits and beer company to identify non-value-added activities in the organization. The focus of the engagement was to ensure that resources and budgets were in line with corporate strategies and recommend which activities should be reallocated, removed or outsourced.



- **Univision — New Advertising POV (2009)**

Marc analyzed and developed a point-of-view for a new television network advertising model, the digital distribution of major studio film releases to local theaters, and cost reduction and revenue growth opportunities for a major Spanish language television network.



- **Starwood — Chinese Contact Center Assessment (2008)**

Marc led an international team in a contact center assessment to evaluate and create a mitigation plan for operating a contact center in Guangdong, China. Areas of focus included: the Political, Regulatory and Economic Landscapes, Human Resource Considerations, Environment, Health and Infrastructure Requirements and Technical challenges.



- **AstraZeneca — Sun Shine Act (2008)**

Marc served as a Subject Matter Expert in the development of a solution for a major pharmaceutical company in support of the onset of the Sun Shine Act. With the government's demand for transparency (all spend was publicly displayed on the Internet) and easy reporting to



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capture spend by sales representatives on physicians and hospitals on everything from entertainment and recreation, non-educational and practice related items.

- **BellSouth — Designed PMO (2006-07)**

Marc established a Program Management Office for the Operator Services organization of a major telecommunication company. He introduced new processes to develop project plans and a methodology to capture status reporting, issues, risks, action items and dependencies.



## TRANSFORMATION

- **Verizon — Billing Modernization Deployment (2020)**

Marc was responsible for the development of the overall Billing Modernization Deployment/Cutover Strategy for a major telecommunication company, covering both the technical and business/operational components of the migration/implementation. Marc worked with the deployment leads and/or program leads of 8 different initiatives, following a DevOps methodology for each in-scope implementation.



- **Carrier — SAP Implementation (2012)**

Marc provided Project Management support of 50+ client resources for an SAP Quote to Cash solution for the Direct Sales Organization of a major manufacturer. The project included support across other Information Technology programs to ensure alignment on all relative timelines such as training and Go-Live.



- **Pearson — International Education Publishing Assessment (2011)**

Marc conducted a review of an international education publishing and assessment services order support organizations. He gathered current operational and performance metrics such as user productivity, order fallout tracking reports, and volume based metrics. Marc identified and quantified current operational challenges in his report to senior executives.



- **ADP — Salesforce Implementation (2010-11)**

Marc worked to support a major payroll company on the implementation of Salesforce as the Electronic Sales Order (ESO) system to auto-



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mate and establish process commonalities across 3 business units where possible. Marc was responsible for their mid-size clients. He gathered business requirements from the user community and key stakeholders. He worked with the technical team to turn the business requirements into technical requirements for use by the developers.

- **TimeWarner — New Sales Platform (2008)**

Marc worked with the contact center to identify requirements for a new sales platform of a major cable company. He conducted all testing and designed the train-the-trainer sessions in preparation for the roll-out of the new platform. Marc remained on site to serve as a SME to support the representatives across a number of contact centers.



- **Fontainebleau — Las Vegas Expansion (2008)**

Marc supported a Miami hotel property's rapid development into the Las Vegas market. He provided oversight with the selection, implementation and integration of their Information Technology systems. He introduced leading practices and recommendations into the IT solution covering operations, strategies and plans.



- **Adecco — Order Management Assessment (2007-08)**

Marc was responsible for designing the future state order and demand management policies and practices, with a focus on introducing a customer-centric culture, standardization, and centralization within the world's largest staffing company.



- **Warner Bros. — International TV Distribution (2006)**

Marc assessed and reviewed supporting technology for major studios International Television Distribution division as a prelude to a complete overhaul of their technology platform. He analyzed 30-year-old legacy systems and developed a strategic vision to sustain growth in international markets. In addition, he specialized in interfacing with the rights, legal and product distribution teams.



- **Orange — New Product Launch (2006)**

Marc led a team for a large international telecommunications company in preparation of the introduction of a new product into the US market. He determined US interest by assessing the telecom market, conducting focus groups and surveys. These inputs were used to establish requirements (business and technical) and a roadmap for implementation



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through testing. He also designed the media strategy and launch.

- **El Paso Energy — CRM Build (2001)**

Marc managed a team of 9 as part of a major energy provider's entry into the wholesale broadband telecommunications market. He led functional and technical teams, implementing a CRM and middleware solution to integrate with existing provisioning and billing systems. His team delivered a solution to support the creation and tracking of customer and system generated trouble tickets. The implementation also included data migration and user acceptance testing.



- **Virtual Jerusalem — New Product Launch (1995-96)**

Marc assessed the marketplace, identified the media approach and led a team responsible for new product development at a start-up international Internet Service Provider. He supervised and trained a staff of 20 responsible for sales, marketing, customer service and technical support. Marc was credited with doubling the client base and reducing the number of cancellations by 75%.



- **Yeshiva University — Director of Admissions — New York, NY (1988-91)**

Marc was responsible for the operations of admissions and recruitment functions for a major university. Through the development of new programs, such as a Model UN and a high school basketball tournament, Marc was credited with increasing student enrollment by 20% over three years. In his role, Marc developed the office of admissions annual budget and established priorities of fund allocation. He represented the university for recruitment functions in the United States, Canada, Europe and Israel.



- **Yeshiva University — Director of Israel Ops — Jerusalem (1993-95)**

Two years after Marc left Yeshiva University for a new job, he was asked by the Executive Vice President of Academic Affairs to return to oversee the university's foreign student program in Israel with 26 affiliated institutions. He introduced new processes and programs to improve and highlight the university to 2000 prospective students. He also served as liaison between the university and government agencies.



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## CUSTOMER EXPERIENCE

- **UnitedHealthCare — Improve Customer Experience (2014)**  
Marc led a team responsible for the development of a multi-year roadmap to improve the customer satisfaction for a major health insurance company as measured by J.D. Power and the client's internal customer surveys. The team identified gaps, analyzed customer verbatim and voice of the employee to ascertain customer pain points. They moved the client from an inside out mentality to a customer experience focus (outside in).
- **NYU — Contact Center Diagnostic (2014)**  
Marc performed a diagnostic assessment of a major hospital in New York's centralized scheduling call center. He observed contact center staff and management to understand current operations. He interviewed physicians within the hospital's faculty practice to understand their expectations and recent experiences with the call center. The assessment included all supporting technologies, call center organizational structure - including reporting alignment, span of control and connectivity to faculty practice operations. He identified and prioritized proposed improvement opportunities for the call center.
- **ComEd — Premier Customer Experience (2013-14)**  
Marc managed a team of 30 internal and client resources responsible to design a premier customer experience for a large Midwest utility. Leveraging leading practices, voice of the customer and employees they were able to identify opportunities relating to culture, operating model, technology, performance management and process improvement they created a multi-year roadmap to achieve an improvement in customer satisfaction, cost reductions and a customer-focused culture. Marc developed a governance model and change management work plan for the organization.
- **Assurant — Introduce Best Practice (2011)**  
Marc introduced best practices for call handling and call center operations for a major insurance provider. He established new agent groups to handle escalations for complex customer issues and an offline team dedicated to extensive research and customer follow-up. He redefined agent and manager responsibilities to address the new organizational structure, and developed a roadmap for a new call routing strategy to ensure best in practice customer service.



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- **DTE — New Product Launch (2010)**

Marc supported a team of client resources of a major utility company to identify the business, technical, training, and reporting requirements for a new contact center to manage the inbound and outbound calls from customers in support of a new product to be introduced to the market. He identified all new processes, training and an implementation plan to build the center.



- **Starwood — Call Center Assessment (2008)**

Marc led a multinational team to assess the contact center operations of a major hotel chain. The assessment led to improvement recommendations, including the introduction of First Contact Resolution, agent empowerment, customer segmentation and targeted metrics, that reduced agent headcount by 20% and improved customer feedback scores by 25%.



- **BellSouth — Contact Center Redesign (2006)**

Marc led a contact center redesign effort resulting in the reduction of 33 contact centers down to 10. He implemented a three-year plan that incorporated the hiring of new agents, the surplussing of others, training needs for agents and management, technology requirements and the development of a communication plan.



- **Sprint — Knowledge Content (2005)**

Marc managed a team responsible for the developments of requirements for a solution to integrate a major wireless carrier's contact centers multiple applications and support tools. The project's objective was to provide knowledge content to an agent's desktops at the appropriate time in the call flow, reducing average work time and customer callbacks with an estimated annual savings of \$60M.



- **Dobson — Amdocs Implementation (2003)**

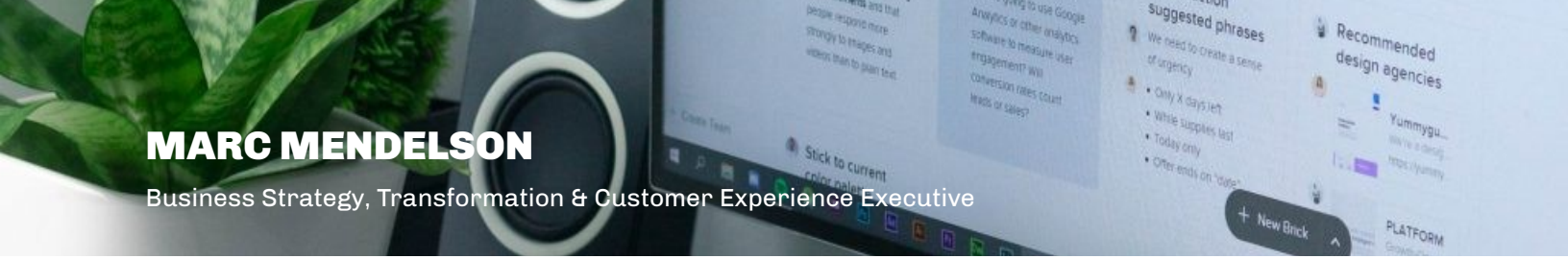
Marc worked with an international team responsible for the functional design, integration, testing and implementation of Amdocs' Clarify Suite for the Greenfield contact center built for major wireless carriers. The team developed all methods and procedures, training and performance metrics.



- **Nextel — Greenfield Contact Center (2002-03)**

Marc was a member of a team responsible for the creation of a greenfield contact center for a major wireless company to support Wireless





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Number Portability in response to a government mandate. Marc built an international team of 14 responsible for the implementation of a CRM solution in collaboration with Telecordia. The team developed all the new processes and procedures. KPIs were developed around service level, average work time, and utilization. The initiative was recognized by Capgemini as "Project of the Year."

- **FedEx — Call Center Transformation (2002)**

Marc led a call center transformation project of a major airline focusing on the redesign of call flow, phraseology and the establishment of offline groups to speed customer follow-up. The project reduced cost per call by 17%, while improving customer satisfaction by 15%.



- **Comdisco — Greenfield Contact Center Build (1999-2000)**

Marc served as the Subject Matter Expert on the development of a new contact center processes for a \$750M start-up company at the advent of CLECs. He established performance measurements, customer satisfaction baseline parameters and internal operations metrics. He introduced credit and collection policies, customer contact standards, troubleshooting procedures, customer service agreements and process mapping for service delivery and service assurance.



- **Verizon — Small Business Services Contact Center (1997-99)**

Marc led an interdepartmental team of client resources of a major telecommunication company responsible to identify opportunities for improvement for the company's Small Business Services contact centers to be focused on the customer's experience. Together with his team they benchmarked performance, developed a business case and budget for the redesign of 29 poor performing call centers. The team developed a detailed plan to introduce new processes and KPIs resulting in a radically new organizational structure.



- **Verizon — Sales and Marketing Programs (1996)**

Marc supervised a sales staff of 28 with a \$1.8 million in annual revenue objective. To achieve these results Marc implemented innovative sales and marketing programs to spur productivity by 15%. Additionally, he served as the Quality Assurance Manager overseeing and training a unionized staff of 200 representatives responsible for servicing the incoming inquiries made by 1.5 million customers on an annual basis, generating \$15 million in new product sales.

