



Kelly Wilson

Education

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

UC DAVIS

Adjunct Professor
of Strategy at the
Graduate School of
Management
2018 - Present

ST. MARY'S COLLEGE

Adjunct Professor
of Marketing at
Graduate School of
Economics and
Business Education
2014 - 2018

Professional Profile

Senior executive with 30+ years of experience in marketing, consulting and industry roles including Partner/Principal, Chief Marketing Officer and SVP spanning strategy, digital transformation, analytics, customer experience, sales enablement, marketing, product development, and operations. Exceptional creativity, storytelling abilities and team leadership skills.

Employment History

ERNST & YOUNG, 2014 - PRESENT

Principal, Strategy and Performance Improvement

Global Client Services Partner for global accounts, San Francisco PELL (People Engagement local leader) for 400+ person advisory practice. Representative engagements:

- **Digital Strategy** – Created a digital transformation strategy for a regional bank looking to update its technology infrastructure in support of a better customer experience. Worked in Agile teams to journey map key experiences, design the “to be” technology architecture, and create a change roadmap
- **Financial Inclusion/Next Gen Payment Strategy** – Created a strategy for a major global payment company looking to enhance financial inclusion through addressing the un(der)banked via mobile apps and social payment products
- **Future of Marketing Organization Strategy** – Created a future vision and roadmap for how a bank’s marketing organization should evolve its organization, capabilities and technology to create better client experiences and sales

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:

- **Business Model Redesign**– Enabled revenue lift of 11% above plan by redesigning the business model for how sales and marketing worked together. Effort included digitizing processes and launching mobile enabled tools
- **Customer Experience Strategy** – Drove 27% lift in net promoter score via a digital customer community, Innovation Center and conference redesign

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:

- **Mission, Vision, Values, Strategy** – Led executive team in creation of new mission, vision and values statements, followed by a full strategy for the business
- **Marketing Strategy** – Increased sales by 23% and market awareness by 37% through improving sales enablement, product mix, and marketing including the creation of a new social platform with webinars, Twitter and a blog components

Professional

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

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

Professional Profile

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.