

post-MBA graduate - goal is transition to consumer packaged goods (CPG)

SMITA PATEL

22 Skyline Drive
Radnor, PA 19087

patel6789@xmail.com
cell: 555.123.4567

Creative Analyst - Consumer Brand Products

CROSS-FUNCTIONAL EXPERIENCE IN FINANCIAL, MANAGEMENT CONSULTING, AND CIVIL SOCIETY ENVIRONMENTS;
UNDERGRADUATE DEGREE - INFORMATION SCIENCE

Earned MBA (Marketing & Finance - Villanova) while working full-time

Key Competencies:

COMPETITIVE
ANALYSIS

MARKET RESEARCH
& POSITIONING

PROCESS
IMPROVEMENT

ACCOUNT
MANAGEMENT

CROSS-FUNCTIONAL
TEAM LEADERSHIP

Selected Accomplishments/Work History

RITTENHOUSE PARTNERS, PHILADELPHIA, PA
MARKETING ASSOCIATE

2005-2008

Provided back-of-the house strategic market planning for the Institutional Asset Management group of this employee-owned firm, known for its blend of quantitative and fundamental investment research. Contributed to management and retention of institutional accounts, including prominent state and local retirement systems, Taft-Hartley pension plans, Fortune 500 companies, as well as national not for profit groups (>\$4.4 billion in assets).

MARKET RESEARCH / PROCESS IMPROVEMENT

Implemented program to reverse client defection from domestic equity products

- Developed survey instrument; conducted competitive analysis; presented to client
- Created monthly flash letter; revitalized sales collateral materials
- Supported move toward socially responsible/green products - assets under management rose 60% in 1 year

Launched revision of New Amsterdam Partners website

- Conducted consultative needs assessment; coordinated expertise of internal and outside experts
- Participated in negotiations with outside vendor; directly managed project during implementation phase
- Promoted new website internally and to institutional clients - traffic increased by >10% in first 90 days

Crafted cross-functional approach to win institutional RFP's - contributed to \$500mm in sales; \$2.5mm revenue

Maximized efficiency of internal knowledge database - realized 40% time savings-quarterly portfolio reviews

AB MOORE & Co., DOYLESTOWN, PA

2004-2005

SENIOR BUSINESS ANALYST, INVESTMENT BANK OPERATIONS

As part of Global Credit Risk Management team, provided firm-wide analytical services and technological advancements to ensure client satisfaction and support bank operations/infrastructure.

TEAM LEADERSHIP / PROCESS IMPROVEMENT

Consolidated more than \$25 billion in loans to create efficiencies for 150 users of internal legacy credit systems

Negotiated service level agreements between IT and end-users; established critical benchmarks for performance and intervention among four distinct credit systems

Initiated process to streamline flow of credit products, e.g. letters of credit and syndicated loans - became infrastructure model

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XGE YARDLEY, PA

2001-2004

CONSULTANT, PUBLIC SECTOR GROUP

XGE IS AN IT AND BUSINESS PROCESS SERVICES PROVIDER WITH U.S. PUBLIC SECTOR PARTNERS IN 44 STATES.

ACCOUNT MANAGEMENT / PROCESS IMPROVEMENT

Collaborated with human services agency partners to facilitate systems overhaul of case lifecycle functions

- Recommended improved gathering systems and deployed mobile options to support fieldworkers
- Implemented technological platform upgrades, as well as other client-centric procedural improvements

Partnered with and led cross-functional teams: in-depth gap analyses resulted in 33% reduction in caseloads

Lead consultant to City of NY Human Resources Administration: achieved efficiencies in enrollment and reporting

Mentored and managed four team members over 4-year tenure; promoted to Deputy Team Leader (2003)

VILLANOVA UNIVERSITY DEPARTMENT OF COMPUTER SCIENCE

1997-1999

Head Teacher's Assistant

TEAM LEADERSHIP / PROCESS IMPROVEMENT

During two-year tenure, was able to accommodate 15% more students in CS classes

- Supervised more than 100 students and 6 teaching assistants
 - Conducted classes for undergraduate students (MS Office Suite, Internet/HTML, Java programming)
 - Developed weekly lesson plans; created special projects; designed interactive website
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Education

Villanova University, School of Business (MBA ranked #11)

2008

Master of Business Administration, Marketing and Finance

University of Pennsylvania

2000

Bachelor of Science (BS), Information Science

Smita was raised among avid Philadelphia sports fans.. As a public high school student, she was an outstanding Tennis player. Current interests include travel, investing, and tennis; she volunteers for organizations including Habitat for Humanity and Consumer Credit Counseling.
