

# James Tierney

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## Profile

Accomplished financial services technology executive that utilizes career experience in sales, marketing, digital & IT to enable business partners. Proven history of aligning new and transformative technology solutions to support critical business priorities.

## Skills

Transformation, Program delivery, Leadership, Strategic planning, Talent management, Digital strategy, Governance, Financial Management, Agile, DevOps, Sourcing, Vendor management, System integration, Compliance & risk management, Sales, Marketing.

## Experience

### **VP, DISTRIBUTION TECHNOLOGY, LINCOLN FINANCIAL GROUP – 2017-PRESENT**

Deliver all technology solutions for Lincoln's wholesale distribution business. Lead a 70-person application development group with responsibility for Salesforce COE, enterprise marketing technology, mainframe data/ETL processes, business intelligence, product illustration & visualization systems. Manage budget and minimize risk to business while driving growth & digital transformation at the executive level.

- Developed & own 3-year technology roadmap enabling sales objectives
- Transitioned all engineering teams from Waterfall SDLC to Agile
- Launched new mobile, Salesforce Lightning-based wholesaler productivity platform
- Delivered a custom, broker-dealer integration program across 20 delivery teams in 13 weeks to meet a sales goal material to LNC earnings
- Reduced budget by 10% by managing transition of a portion of the portfolio to offshore sourcing partners
- Implemented program to comply with NYSDFS Cyber regulations across all apps (encryption at rest, event monitoring, multi factor authentication)

### **AVP, DIGITAL STRATEGY & PLANNING, LINCOLN FINANCIAL GROUP – 2014-2017**

Drive strategic digital initiatives for LFG Distribution (retail and wholesale) in partnership with executive leadership in marketing, product & sales. Conduct journey mapping exercises and transactional studies to develop digital strategies focusing on experience, cost reduction and new revenue - then position those strategies with executive leadership.

- Delivered RIA/fee-based advisory experience strategy for Lincoln's entry into this new distribution channel. Led execution program to build out custom web experience and B2B integration.
- Led technology evaluation of \$200mm+ fee-based M&A target, reporting to CEO.
- Delivered an RPA-based product performance iPad app from ideation to product in 4 weeks, saving \$200k+ in dev cost and driving \$10mm+ in new revenue in 8 weeks following.
- Developed strategy, personas, and journeys for new broker-dealer dynamic digital financial planning experience.

**SENIOR CONSULTANT - DIGITAL, NATIONWIDE FUNDS – 2012-2014**

Reported to CMO of Nationwide Mutual Funds with responsibility for all digital, social, mobile and content marketing initiatives as well as technology strategy and implementation. Led a team of marketers and technologists in two states.

- Launched omnichannel content marketing program that drove an 87% new visitor increase, 39% page view increase, 25% time on site increase in first quarter.
- Launched an industry-first fund analysis & comparison tool that exceeded user acquisition goals and drove directly attributed sales of \$15mm+ within four months.
- Implemented an automated document production and asset management system to streamline creation of data-heavy marketing material. Reduced staff required for production from 2 FTE's to 1 FTE and production cycle time from three months to three weeks.
- Migrated two public-facing websites from Documentum to Tridion SDL

**DIRECTOR OF STRATEGY, REALTIME MEDIA; BRYN MAWR, PA – 2010-2012**

Planned custom digital marketing campaigns and social applications for clients that acquired consumer data. Consulted with clients on media buying, SEM and social media strategies to drive traffic. Analyzed and reported campaign data.

- Developed strategy to convert a subset of agency services to a scalable application platform, retaining a multi-million dollar media client while reducing cost and creating a new revenue opportunity.

**DIRECTOR OF BUSINESS DEVELOPMENT, PHILLY.COM – 2007-2010**

Responsible for developing strategies to increase the effectiveness of media content and advertising. Maximized clients' advertising ROI with the full array of digital product offerings from [philly.com](http://philly.com). Also acted as Associate Publisher, "I" Magazine and Real Estate Sales Manager.

- Reworked sales territories and workflows in Real Estate Classified sales, resulting in a 50% headcount reduction while maintaining top annual sales rankings in 2009.

**REGIONAL MARKETING DIRECTOR, LINCOLN FINANCIAL GROUP – 2004-2007**

Marketed variable annuity retirement income solutions to financial advisors and their clients in the wirehouse channel in Northern NJ/Northeastern PA. Traveled throughout the territory conducting face to face meetings, group presentations and educational seminars. Also acted as internal sales team leader and internal wholesaler.

**INTERNAL SALES REPRESENTATIVE, PLANCO/THE HARTFORD – 2002-2004**

Marketed variable annuity retirement income solutions via phone to financial advisors and their clients in all channels in three sales territories across the US. Also acted as interim wholesaler, Hartford Canada Mutual Funds.

## Education

Columbia University in the City of New York

## Licenses

FINRA Series Six (*active through June 2014*)

## References

On Request