

# John T. Wilson

Executive Leadership | Transformation Delivery | Strategy and Planning

**Focus:** Software / Consulting Firms / FS Organizations Pursuing Growth

**Industries:** Emphasis in FS / Insurance + Customer Service / Contact Center

**Professional Portfolio & Case Studies:** [www.johntwilson.com](http://www.johntwilson.com)



Tech & Business Innovation | AI, Cloud, Data, BPM, SaaS | Customer Experience | Agility | Strategic Thinking

Artful Storyteller with Ability to Sell and Deliver Transformation to Financial Services Organizations

Collaboratively Engage CXOs, Envisioning + Crafting Executable Roadmaps + Business Strategy to Achieve Ground-Breaking + Measurable Business Outcomes That Add Exceptional Client Value

DELIVERED \$100M+ IN RESULTS | LED MULTIMILLION\$ BUDGETS | CROSS FUNCTIONAL COLLABORATION | INFLUENCE

**Technology Strategist and Business Innovator** orchestrating large scale operational improvements + go-to-market solutions; helping consulting + technology SaaS, data and AI implementations within customers. Understand selling processes leveraging experiential stories of transformation to influence executive buy-in and cultivate sustainable, trust-based relationships.

- **As Integral Leader, Delivered \$100M+ in Results** via complex tech transformations + business process improvements for clients like JP Morgan Chase, Bank of America, Frankling Templeton, MetLife, and Aegon.
- **Sold \$30M in New Business Development** at Grant Thornton and KPMG, surpassing annual targets. Collaborated with cross-functional teams to sell creative approaches and services to existing and new customers. Co-developed initial AI customer services solution proofs of concept to take to market.
- **Led Modernization Efforts as Customer Service SaaS, Cloud + AI + Data Expert:** \$50M M&A acquisition and integration of on-premise to AWS (Amazon Web Services) Cloud. Guided customer in migrating acquired competitors' technology and data to AWS. Also, earned 7 Cloud, AI, Data certifications, 24 mos.
- **Achieved \$12M in Cost Savings via Implementation of New IVR:** Introduced Genesys IVR and screen pop capabilities in 1000 seat contact center resulting in customer self-service and elimination of 300K calls every month (15% of 2M monthly incoming calls).
- **Delivered Multiple Low-Code SaaS Workflow Solutions:** \$3M Appian project driving 41% improvement, \$2M Pega project leading to 30% gain, IBM project enabling 70% efficiency, and AWD project for 95% gain.
- **Building and Learning Agentic AI Capabilities:** Continually self-educating + learning how to build conversational AI agents with Salesforce Agentforce + AWS Q Business; also studying AWS Connect + Lex.
- **As Influential Communicator + Cool-Headed Problem Solver,** facilitated client workshops to define future state processes, articulate best practices, develop roadmaps and implementation plans as well as perform conflict resolution. Often parachuted into at-risk accounts / projects including role as SWAT team member at Pegasystems to solve challenges, reduce customer churn, grow and expand accounts.
- **Recruited, Coached, Inspired and Scaled Global High-Performing Teams** driven to deliver under pressure. Built and / or led up to 50+ person transformation teams comprised of offshore architects, cloud specialists, application developers, business process analysts + testers. Managed client resources across business + IT teams. Delivered services in US, Japan, S. Korea, China, Australia, Mexico + Europe.

DEFINING  
CAREER  
MOMENTS

## EDUCATION | TRAINING + CAPABILITIES (Partial Listing) | CERTIFICATIONS

**BACHELOR OF SCIENCE, BUSINESS ADMINISTRATION, WILLIAM JEWELL COLLEGE, LIBERTY, MO**

SALESFORCE AGENTFORCE AI | GENERATIVE AI + PROMPT BASICS | SALESFORCE - BUILDING AGENTS IN AGENTFORCE | NATURAL LANGUAGE PROCESSING (NLP) - AWS COMPREHEND | AWS CONNECT CCAAS | AWS Q | RAG | AWS LEX | APPIAN LOW CODE PLATFORM | SNOWFLAKE



EDUCATED IN KEY MODERN INDUSTRY TRENDS IN CLOUD COMPUTING, DATA MANAGEMENT, AI, ML, SAAS PLATFORMS, AND AGENTIC TOOLING

## EXECUTIVE CAREER HISTORY & HIGHLIGHTS

### DIRECTOR - DIGITAL TRANSFORMATION & CUSTOMER SUCCESS • Grant Thornton - Phoenix, AZ • June 2019-Dec 2024

1 of the world's leading independent audit + assurance, tax and advisory firms with a network of 73K professionals in 146 countries.

**Chosen to help drive revenue and deliver digital transformation** to improve clients' nimbleness, efficiency, and ability to reduce time to market. Overachieved mandate to drive **\$2M per sales + 80% utilization** and manage (through delivery) **\$4M+ of projects per year. Powered Cloud + AI intel / learning with 7 related certifications in 24 months.**

- **Negotiated Deals: Overachieved annual sales targets by 2-3X**, closing a total **\$16M** sales during tenure.
  - Immersed in sales opportunities and processes + consummated deals with teams, partners / execs and business development resources; nurtured software vendor alliances, enabling further sales.
  - Forged credibility with customers via successful delivery, fueling additional sales and radiating within current accounts.
  - Accountable for implementation, budget and margins, value realization, adoption, and overall customer satisfaction.
- **Helmed Large Cloud and Data Conversion: Project managed Amazon Web Services (AWS) \$50M M&A integration project**, migrating rival's customer data and related CRM tools / dispatch systems from on-premise to AWS Cloud.
  - Team management: Internal resources + 15 offshore architects + developers migrating to AWS EC2 instances needed S3 storage, user account setup and related security permissions via IAM.
  - Leveraged AWS discovery + migration tooling to move needed capabilities and data. Data was also migrated to Snowflake for historical reporting and data analytics.
- **Sold + Delivered (total \$5M) in Large, Complex US Government Entity - Appian: Orchestrated alliance between GT + Appian; delivering \$3M Department of Labor and \$2M Center for Medicare/Medicaid projects** in collaboration with GT exec / account owner - designed, built + tested low code digital workflow, etc. solutions.
  - Department of Labor / OSHA: Improved US-wide business processes for tracking fines--included efficiencies-focused solution for nationwide fine tracking; outstanding fines recovery rates; and contact center call reduction / AHT efficiencies. Project ultimately shelved amid Administration change from Trump to Biden.
  - Center for Medicare / Medicaid: Carved efficiencies--**sped up process by 41% + enabled audit-sample-size increase and uptick in # of applications reviewed**--within annual review and audit of Affordable Care Act insurance application submissions process. Automated sample applications to review, designed architecture, digitized workflow and user experience design + renovated exec-level dashboarding of audit progress + key metrics and KPI's. In addition to efficiency gains, the solution also significantly improved data quality and data governance.
- **Generated \$3M Repeat Business on Heels of Success Results in New Hotel / Gaming Resort industry**: Crucial delivery team member on aggressive 12-month tech implementation for \$5B Fontainebleau Hotel + Casino on Las Vegas strip that generated additional \$3M in services via customer relationship building, earned trust, and overall delivery quality.
  - As member of 6-person project management team overseeing 150 software and IT solutions vendors and \$3M in sales, personally charged with all tech solutions across full casino / gaming (including high limits), and the Cage / Finances.
  - 2 weeks ahead of doors opening validated readiness, garnered Nevada Gaming Commission approval; achieved by delivering ALL required solutions across gaming and cage (3K slot machines; 120 gaming tables; high-limit slots; high-limit tables; exclusive game salon on 65th floor; sportsbook; and multiple cages across property).
  - All critical solutions and IT requirements fully functional; 0 significant outages or network issues and latency occurred.
  - Trained >1000 gaming + cage-related employees on in-scope technologies and business processes ahead of opening.
  - Our team worked for property's CEO + CFO; I also worked for EVP of Gaming and EVP of Finance for cage-related items.
- **Supported C-Suite on \$30M Transformative Global Cost-Reduction** program, delivering on 6-month, on-site mandate working for Global Chief Transformation Officer + CIO of client (Alcon); as well, collaborated with core processes EVPs + functional owners (Sales, Supply Chain, R&D, Finance, IT, etc.).
  - Helped establish standardized reporting structure and cadence for Alcon execs + ultimately for employees to assume.
  - Integral in reporting / status setup re: 30 major system efforts and global footprint: Salesforce, Veeva, ServiceNow, SAP, Supply Chain, etc. Goal beyond savings was to standardize global processes and improve overall data management.
  - Collected VOC input, prioritized feedback, and worked with teams to incorporate feedback into go-forward plan.

**DIRECTOR – DIGITAL TRANSFORMATION AND CUSTOMER SUCCESS • KPMG LLP - Kansas City, MO • Sept 2014-June 2019**

*Global network of value-focused professional firms providing Audit/Tax/Advisory services via 273K people in 145 countries/territories.*

**Brought on board to support digital transformation + growth initiatives** for national practice. **Consummated >\$14M in Sales (overachieving on \$2M per year sales goal)**, in collaboration with KPMG exec partners / business development leaders. Supported RFPs; Identified new opportunities + tracked pipeline in CRM; collaborated on proposals, produced SOW's, shaped project scoping + pricing; as well, co-developed sales materials and thought leadership + participated in client presentations.

- **Integral leader driving ~\$10M tech partnerships** revenue / pipeline with Financial Services clients that multiply to this day.
  - Forged and managed alliance partnerships with Appian, Pegasystems (for Public Sector) and IBM to implement their market-leading digital workflow platforms, in alignment with KPMG's US digital solutions practice growth strategy.
  - Authored whitepapers + marketing decks, edifying firm leaders on Appian alliance, capabilities, and use cases.
- **Sold + delivered digital solutions** at PayPal / IBM (\$3M); and Santander Bank / Appian (\$1.5M); as well, Bank of America + Goldman Sachs; headed effort at MetLife + Alcon. Leveraged customer centricity and collaborative mindset to drive results. These engagements included business requirements gathering, data model development, data governance, solution development, testing, and deployment.
  - Reduced approval timelines by 70% (PayPal) after optimizing and streamlining treasury transaction processes. Oversaw offshore developers, client SMEs, business analysts + testers in delivery of IBM BPM workflow.
  - Slashed contact center average handling time by 35% (Santander Bank) after digitizing / improving contact center / incoming dispute processes for customers (Appian), and improved customer experience, data quality, and reporting.
  - Cut report development timelines by 80% (Bank of America), delivering large robotics proof of concept for regulatory compliance team and leading technical team that automated monthly / quarterly regulatory dashboards.
  - Headed global initiative - lean improvements at MetLife: US, Japan, S. Korea, China, Mexico, Brazil, Europe; and Alcon.

**VP – PROCESS OPTIMIZATION AND TECHNOLOGY STRATEGY • UMB Financial - Kansas City, MO • Sept 2010–Sept 2014**

*Leading provider of financial services for individuals + institutions.*

**Recruited to lead + deploy enterprise-wide change across 100-year-old bank**, amid pushback of extreme change-resistance. Cultivated and built relationships with key leaders across the bank; conducted organizational process analyses, identifying and ability to prioritize improvement projects based on ROI + complexity; and collaborated with C-suite to gain approval.

- **Recruited, hired, and developed team of 6 high-performers:** tech, lean six sigma + banking experts through coaching was able to excel and became 1 of UMB's best and most in-demand teams; managed \$1M annual budget.
- **Identified gaps, prioritized recommendations, and quantified business cases / ROI** and implemented solutions.
- **Ultimately produced \$11M in measured savings** (from \$30M in unearthed opportunities) from implementing process and technology improvements to customer-facing and backoff processes for improved efficiencies and customer experience.
- **Implemented automated workflow** for credit card underwriting and onboarding process (80% reduction in cycle time).
- **Delivered redesigned organization structures** via implemented business performance improvements and newly streamlined team structures. Executed and provided needed change management activities to enable and drive technology adoption.

**ENGAGEMENT LEADER – PROCESSIONAL SERVICES DELIVERY LEAD Pegasystems • Cambridge, MA • June 2008–Sept 2010**

*Leading BPM workflow platform (at that time); premier software organization in market niche.*

**Accountable for flawless delivery and financials of digital automation efforts at large financial services clients.** Led teams up to 30 people, including offshore talent in delivery of on-time / on-budget solutions. Managed \$2M-\$7M project budgets.

- **Parachuted in to resurrect failing project at JP Morgan Chase: integrating a large \$2B acquisition of Washington Mutual.** Both JPMC and Washington Mutual were Pegasystems customers + were operating different versions.
  - Embedded into organization and leveraged analytical skills to quickly internalizing, prioritizing, and addressing complexities of plan / expectations / issues as well as key stakeholders (Pegasystems, JPMC team / leadership, etc.)
  - Orchestrated + executed go-forward solutions--mitigations; transparency + communication to executive leadership; structure; and delivery methodology.

- Regained client trust + business--JPMC went on to become one of Pegasystems' largest global customers-and enabled a more collaborative, communicative teamwork culture.
  - In just 4-6 weeks, earned client leadership trust + restored project integrity; team delivered + met all originally planned timelines + completed within budget.
- **Realized 30% operational efficiency gains** steering large Pegasystems execution across Franklin Templeton Mutual Funds.

## Early Career

*Hit career ground running driving \$10Ms in bottom line savings + earning reputation as solutions provider trusted to parachute into challenging, failing and / or rapidly advancing scenarios. Overcame customers' and execs' reluctance to change with data + by delivering quick-hit tech wins while delving into financial services and insurance verticals. Honed deal-making chops while concurrently recruiting / developing teams. Jumped into Big 4 consulting, swiftly rising to Top 10 of peers.*

**SENIOR MANAGER • Asurion** | Owned \$2M P&L | Built 5-person team | Property and Casualty (P&C) Insurance Firm

**OVERARCHING IMPACT: Cut \$18M overall in operating costs.** Reporting to CIO, performed as integral leader in accelerating company's growth through ROI presentation / approval / delivery of innovative process / technology / contact center / IVR, claims management advancements (89% improvement). Utilized experience in transformation to review processes, identify gaps, collect business insights, develop recommendations, and implement operational efficiency and improved experiences.

**MANAGER • Amdocs** | Owned \$2M P&L | Recruited / developed 10-person team | Client Focus: Large Tier 1 Telecom Co's

**OVERARCHING IMPACT: Identified >\$10Ms in issues / data-driven recommendations** for customers after building + leading new team focused on operational excellence for telecommunications companies. **Marquee result: Delivered \$14M in bottom line savings** for Qwest Communications through series of portfolio improvements and follow-on work.

**SENIOR CONSULTANT • Ernst & Young** | 1 of 10 Top resources out of 300 Midwest based employees at fast-moving, Big 4 professional services and consulting firm.

**OVERARCHING IMPACT: Pinpointed >\$10M's in efficiency opportunities for large tier 1 telecommunications companies.** Assimilated quickly in Big 4 culture of speed including quickly digesting + acting upon voluminous amounts of information while also following formal methodologies and exhibiting executive gravitas in communications + presenting.

**BUSINESS PRODUCT CONSULTANT • SS&C / DST Systems** | Led digital transformations across client companies.

**OVERARCHING IMPACT: Helped large financial services + insurance organizations achieve 30%+ improvements in operational efficiency** through digitizing paper-driven customer service / contact center processes via document imaging + workflow solutions

## TECHNOLOGY | DIGITAL TRANSFORMATION CORE COMPETENCIES (Full Listing)

### CERTIFICATIONS

AWS Solutions Arch – Associate ( <i>In Progress</i> )	AWS AI Practitioner (AIF-C01)	AWS Cloud Practitioner (CLF-C01)
Microsoft Azure Cloud Fundamentals (AZ-900)	Microsoft Azure AI Fundamentals (AI-900)	AWS Textract OCR / NLP
Microsoft Azure Data Fundamentals (DP-900)	Microsoft Power Platform Fundamentals	Salesforce Agentforce AI Specialist
Pegasystems Certified Architect	Certified Scrum Master / Product Owner	Lean Six Sigma Green Belt

### ADDITIONAL TRAINING / PROFESSIONAL DEVELOPMENT

RESPONSIBLE GENERATIVE AI | APPIAN | SNOWFLAKE | AWS BEDROCK | AWS Q BUSINESS VIRTUAL AGENT | RETRIEVAL AUGMENTED GENERATION (RAG) | AWS LEX | AWS CONNECT ROUTING FUNDAMENTALS | AWS CONNECT IMPLEMENTING CHAT | FUNDAMENTALS OF MACHINE LEARNING + LARGE LANGUAGE MODELS | FOUNDATIONAL MODELS – OPENAI AND LLAMA | IBM BPM / WORKFLOW | GOOGLE GEMINI | ASANA & JIRA USER STORY SOFTWARE | COST MANAGEMENT FOR AZURE + AWS CLOUD COMPUTING | FUNDAMENTALS OF GEN AI | MICROSOFT COPILOT | CHATGPT | DST / SS&C - AWD | MICROSOFT OFFICE SUITE | MICROSOFT PROJECT