

Jim Graddon, Management Consultant

Summary

A seasoned executive consultant offering a rare combination of financial services and IT industry experience that includes operational management, marketing, sales, product management, and an impressive track record of IT-related successes from both an organizational and a vendor perspective. Clients grow to depend upon Jim's conceptual abilities, insight, candor, and enthusiastic mentoring approach. He is very adept at isolating key success factors and creating tactical solution programs to realize them. He is an analytical quick study who can create his own roadmap for uncharted territories. Backed by over of thirty years hands-on experience in a variety of disciplines, Jim's intense work effort provides true value added service and quicker results than you would normally expect in almost any situation.

Over the years he has tackled almost every business process reengineering and automation challenge within the operational, distribution, and product development areas of life insurance, securities and mortgage investment, mutual funds, IT, and software vendor communities. As interim executive, advisor, business development, or project champion, Jim offers both strategic and tactical guidance and leadership through hands-on immersion as a top line renewal catalyst or operational change agent.

Consulting Experience

1994 to present	TopLine Catalyst Group	Oakville, ON
E-Z Data, Pasadena	General Manager, Canadian Operations	Feb 2006 to Nov 2009
<p>This top line renewal assignment turned around a declining revenue trend and tripled business over a three year period. Launched a "Software as a Service" business for financial advisors and agencies. Executed upon a branding strategy through personal visibility, public speaking, seminars, and direct marketing. Led the adaptation of the software with personal insight and market research. Instigated a number of acquisition opportunities and acquired and integrated a significant competitor.</p>		
E-Z Data, Pasadena	Strategic Marketing Consultant	Apr 2005 to Jan 2006
<ul style="list-style-type: none"> ➤ Retained by this specialized CRM vendor focused on financial service distribution at advisor, insurance agency, and wholesaler levels to be a catalyst from a new business perspective across North America. Role included developing a top line renewal strategy and business plan for Canada that resulted in an additional long term assignment to execute on the strategy. Engineered sales with large Canadian banks and major US insurance companies. 		
Enara Technologies, Ottawa	Strategic Marketing Consultant	Apr 2004 to Apr 2005
<ul style="list-style-type: none"> ➤ Retained by this Electronic Document Management Software Integrator to establish a new niche strategy to target the insurance industry across North America. Role included supporting sales staff in client meetings, preparing and reviewing RFP responses, developing marketing and PR materials, and conducting direct marketing campaigns. 		
Winfund Software, Ottawa	Strategic Marketing Consultant	Mar 2004 to Apr 2005
<ul style="list-style-type: none"> ➤ Retained by a financial industry software vendor to develop a new niche strategy to support financial product distribution including assessing business requirements, guiding software design, and creating business and marketing plans. Assisted sales team in sales situations. Also included identifying and doing due diligence on a competitor acquisition opportunity that was successfully engineered. 		
CNW Group, Toronto	IT Strategic Advisor	Feb 2004 to Sept 2005
<ul style="list-style-type: none"> ➤ Retained to guide the reengineering of IT organization, strategic IT planning, and systems renewal. Includes developing business requirements, guiding RFP process, and doing due diligence on solution vendors. Acts as mentor for Director of IT. 		

- PMCorp, Toronto Strategic Marketing Consultant Nov 2003 to Feb 2004
- Engaged to develop a go-to-market strategy for expansion of a management consulting organization. Involved in market research, sales opportunities, development of marketing materials, establishing website, and coordinating a seminar.
- Point Solutions, U.K. Strategic Marketing Consultant Feb 2003 to present
- Engaged to assist software organization to create North American go-to-market strategy in the insurance and financial services sector. Created direct marketing strategy, developed marketing and PR materials, assisted with sales opportunities, and acts in an advisory capacity on an ongoing basis.
- Cognicase/CGI, Toronto VP, Insurance Industry Consulting Dec 2002 to Feb 2003
- Cognicase acquired the business assets of Acordial and was engaged with full divisional GM responsibilities focused on building an insurance vertical revenue base. Performed market research, developed go-to-market strategy, conducted direct marketing campaigns, assisted in sales generation, and managed local staff.
- Acordial, Toronto President & CEO May 2001 to Dec 2002
- Engaged as CEO of this spin-off organization of Logisil. Continued to create an insurance industry vertical launch strategy and to open the Southern Ontario market. Performed market research, developed go-to-market strategy, conducted direct marketing campaigns, assisted in sales generation, and managed local staff.
- Schwab Canada, Toronto Strategic Marketing Consultant Apr 1999 to Oct 1999
- Engaged to manage the launch of new mutual fund business for Charles Schwab (Canada). Conducted investment manager selection, software selection, and led a team in designing the operational infrastructure.
- Logisil, Toronto Strategic Marketing Consultant Jul 1997 to May 2001
- Engaged as part-time VP, Marketing & Sales to create an insurance industry vertical launch strategy and to open the Southern Ontario market. Performed market research, developed go-to-market strategy, conducted direct marketing campaigns, assisted in sales generation, and managed local staff.
- Tims Inc, Montreal Strategic Marketing Consultant July 1997 to Mar 1998
- Engaged as part-time VP, Marketing & Sales for this start-up technology organization. Developed business plans, marketing plans, awareness programs, and led a number of strategic sales initiatives and venture capital approaches.
- Premier Solutions, Toronto Interim Canadian Country Manager July 1996 to Apr 1997
- Interim Canadian Country Manager for Premier Solutions, a securities software organization (now Sungard). Developed business plan, managed key account, and led new business sales force.
- Compaq, Toronto Strategic Sales & Marketing Consultant Apr 1995 to Apr 2001
- Insurance industry strategist for Compaq Canada. Developed insurance go-to-market strategy, conducted sales training focused on insurance industry sales, featured insurance industry teleconference speaker, featured lecturer on sales training CD, conducted consultative sales training. Also, performed numerous assignments in Europe and Canada supporting sales and professional service initiatives.

- Resigned four cancelled key accounts worth an additional \$4 million annually.
- Appointed Chairman of a company-wide sales task force to improve sales productivity and processes.
- Performed occasional strategic consulting assignments related to group life & health insurance, self-directed investment programs, and mortgage investment requirement definition and workflow reengineering.

1980–1985 Financial Research Institute (FRI) Canada

Business Unit Manager, Asset Management Solutions

- Doubled company’s annual revenues by opening up new insurance company niche.
- First non-principal salesperson evolving into key account manager and business unit manager. Transferred to Toronto from Montreal on demand from key accounts.
- Sourced and launched new products, hired and managed the sales force, and coordinated a national advertising and public relations campaign.
- Exceeded sales targets every year by as much as 220%.
- Performed occasional strategic consulting assignments related to portfolio management, mortgage investment, bond calculators, performance, investment accounting, and statutory reporting related to requirement definition and workflow reengineering.

1969–1980 Foundation Years Montreal, QC

IT, Accounting, and Administration

- Progressive roles in Royal Trust, Sun Life, and Standard Life
- Moved into management at unusually young age and was assigned three successive departments in which goal was to reengineer business processes, IT systems, and staffing.
- Led the development of IT systems for portfolio management, mortgages, shareholder recordkeeping, bond trading, tax accounting, and statutory reporting.

Credentials

Bilingual (English and French)
 McGill University (Marketing, MIS, and Accounting)
 University of Western Ontario (IT Management)
 Hartford Graduate Centre (Creative Leadership)
 Canadian Securities Course
 Many sales, project management, and quality courses
 Member CIPS, LOMA, AFCOM