

# FERNANDO PENA JR.

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## SENIOR EXECUTIVE – MARKETING / DIGITAL SOLUTIONS

### STRATEGIC PROFILE

Versatile Senior Leader with entrepreneurial reputation as Digital Marketer, Creative Innovator, Early Adopter, Change Agent and Team Builder. Highly skilled in managing all aspects of marketing from client/agency sides and digital experience across web, email, display, video, mobile and social advertising. Widely recognized by client executives, industry peers and thought leaders for deep abilities in deploying digital marketing technology, administering large-scale projects and optimizing marketing operations.

- Positive talent in negotiating, influencing, motivating and supervising multi-discipline teams and diverse executive personalities within matrixed organizations; fully accountable for P&L, budgeting and cost controls.
- Proficient in collaborating with B2B clients, consultants and top decision-makers in planning and executing complex and multimedia marketing initiatives in time-sensitive situations.
- Solid expertise in utilizing omni-channel campaign analysis and optimization to drive persistent revenue growth, while bridging marketing and technology resources to continually improve customer experience and brand presence.
- Extensive exposure to cross-cultural dynamics and international business practices through positive interaction with clients across multiple sectors; proficient in conversational Spanish.
- Progressively promoted through levels of increasing responsibility and impact because of outstanding talents in supporting strategic planning, market presence and success metrics.
- Self-motivated to achieve maximum product performance, ensure timely project completion, maintain peak quality standards and achieve aggressive business objectives.

### CORE COMPETENCIES

Digital Marketing • Internet/Intranet • E-Commerce • New Business Development • Strategic Planning • Profit Building • New Product Introduction • Market Penetration • Internet Marketing • Vendor Relations • Project Expediting • Requirements Analysis • Lead Generation • Product Portfolios • Operational Streamlining • Technology Deployment • Market Trend Review • Software Evaluation • Emerging Technologies • Contract Negotiations • Public Relations • Branding Strategies • Team Motivation • P&L • Budgeting • International Business • Voice of Customer

### TECHNICAL BACKGROUND

Acoustic Campaign • Adobe Experience Platform • Bold 360 • CentOS • Concentrix • Coremetrics • cPanel • CSS • Dreamweaver • Eloqua • Google Analytics • HCL Unica • Hootsuite • HTML • Hubspot • JIRA • Linux • Medallia • Oracle Real Time Decisions • Photoshop • PHP • Rally • Salesforce • SAS • Sharepoint • Siebel Marketing/CRM • Wordpress • MS Office Suite • SEO • SEM • Agile/Waterfall Methodologies

## EMPLOYMENT & ACCOMPLISHMENTS

### TRUIST, CHARLOTTE, NC (2020-Present)

#### SVP, Director of Marketing Technology

Manage three direct reports, 56 staff and \$35M budget in preparing and executing full range of digital initiatives to drive data transformation, real-time offers and voice of customer for this regional bank. Deploy expertise in excelling across all client segments and channels.

- Team-led rollout of Adobe Experience Platform personalization platform forecasted to generate \$70M+ in new revenue over next three years.
- Smoothly transitioned Unica campaigns to StreamAnalytix environment, increasing campaign output productivity by more than 45%.

- Migrated Concentrix, Qualtrics and Medallia Voice of Customer platforms to company's new website, creating unified and consistent customer feedback experience.

**SEACOAST BANK, STUART, FL (2017-2020)**

**SVP, Head of Digital Capabilities, 2019-2020**

Promoted to initiate new efforts to enhance customer experience and comply with industry regulations using new digital platforms that better positioned the bank within the financial services sector. Directed two professionals and \$6M budget in coordinating website, online banking, mobile apps, ATM screens, email marketing and CRM systems.

- Expanded digital banking capabilities to support next-gen online banking portal with new interface, increasing click-throughs by 15% with new offer promotions and customization.
- Introduced virtual chatbot to help with Covid-related inquiries for PPP loans, loan forbearance requests and other issues, decreasing call center traffic by more than 35%.
- Created and instituted full-scale branch scheduling system across entire retail environment to address Covid lockdown challenges, quickly processing 1,000 appointments on daily basis.

**SVP, Digital Marketing & Experience, 2017-2019**

Supervised one direct report and \$2M budget in directing digital marketing assets involving website, social media, radio advertising and marketing automation platforms for all bank businesses. Focused on driving organic digital growth and improving digital customer experience.

- Spearheaded company's first website redesign in four years with five-month timeline, focusing on user experience and monetization of digital channel; basis created for personalization and artificial intelligence efforts on digital roadmap.
- Led team in launching end-to-end prospect conversion tracking platform that calculated cost-per-acquired customer and lifetime conversion value across all platforms.
- Improved cost-per-acquisition by 9% for incoming digital prospects with new scoring models that were continually refined per precise tracking and targeting methods.

**WELLS FARGO, CHARLOTTE, NC (2015-2017)**

**VP, Digital Product Manager**

Developed and supported digital innovations for all banking products across web and mobile platforms for entire enterprise in connection with different project teams. Defined, tested and implemented new product deployments and enhancements to existing digital assets per agile and waterfall methodologies.

- Piloted ongoing development of financial health tools to provide FICO scores and debt-to-income ratio calculator with more than 3M customers opting into the solution.
- Project-led design of mobile app that focused on increasing customer savings rate, improve client retention and drive incremental revenue, achieving over 83K installs in first 90 days.
- Rolled out full-scale alerts system to track savings milestones for customer deposit accounts, generating 240K alerts in 90 days.

**BANK OF AMERICA MERCHANT SERVICES, CHARLOTTE, NC (2010-2015)**

**VP, Digital Marketing**

Supervised three staff and \$4M budget in creating and executing digital/mobile marketing strategy, data review and campaign optimization through media planning, web design, user experience, Eloqua campaign automation, Salesforce integration and chat platforms.

- Designed and established new corporate website that increased online visitor traffic by 300% with targeted brand marketing strategy to expand awareness and product visibility.
- Initiated comprehensive digital marketing program that provided leads from full range of media sources, exceeding acquisition goals by 30% and remaining 15% below CPL forecasts.
- Introduced new paid media digital marketing plan that generated 60% of total lead volume for Inside Sales team, while reducing costs by 75% over previous digital approach.

**RED F / MYTHIC MARKETING, CHARLOTTE, NC (2007-2010)**

**Marketing Analytics Director**

Led three-person team in performing campaign analysis, process refinement, audience segmentation, user evaluation and configuration of real-time decision platforms to automate web offers and site customization for B2B clients.

- Generated \$10M in additional revenue from increased web and email response rates for national insurance client through real-time decision platform, based on SAS and Oracle Marketing analytical model.
- Improved revenue levels by 10% over previous strategy and reduced attrition by 2% for retirement brokerage firm after enhancing customer experience with enhanced production selection and customer service solutions.
- Lifted product performance by 4% with targeted banners on customer web portal and new reporting and decision-making platform for US finance client.

## PREVIOUS EXPERIENCE

- Held critical management roles in customer experience, CRM optimization and client consulting with market leaders – Accenture and TIAA.
- Accenture – supervised multinational campaign team in marketing outsourcing project for major US retailer, saving \$2M in yearly costs after outsourcing direct mail and outbound marketing functions.
- TIAA – directed team in creating more than 600 marketing campaigns each year with audiences ranging from 50 to 3M individuals across multiple market segments and channels.

## EDUCATION

**MBA – Marketing Management (2007)**, BENEDICTINE UNIVERSITY, Lisle, IL

**BA – Computer Information Services (2002)**, MONROE COLLEGE, New York, NY

## PROFESSIONAL ACTIVITIES

- Frequent industry presenter on multiple topics, such as digital personalization, digital transformation and CRM platforms, at national conferences, including GDS, DMA and Hubspot InBound.