

# BILL JATES

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## SENIOR MANAGER – MARKETING & COMMUNICATIONS

Analytical, detail oriented Marketing & Communications professional with solid record of driving sales to new heights. A hands-on leader with expertise in branding, advertising, media planning, collateral/website development, public relations, events, channel marketing, and agency/vendor management. Proven ability to partner with national sales forces of over 1,300 professionals to design and deploy compelling campaigns that acquire customers and gain a competitive edge. Highly computer proficient with extensive experience in online and offline marketing. Experienced in B2B and B2C markets. Areas of specialization include:

**Market Analysis – Relationship Management – Affiliate Programs**  
**Marketing Communications – Public Relations – Budget Management**  
**Copywriting & Design – Product Development & Launches**

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## PROFESSIONAL EXPERIENCE

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### VICE PRESIDENT - CORPORATE DEVELOPMENT

2001 – 2003

#### HOME MORTGAGE ✧ GLENDALE, NY

*The east coast's leader in mortgage banking.*

Reporting to the CEO, recruited to corporate headquarters to develop new programs to increase loan volume and revenues. Assumed full responsibility for designing and implementing lead-generation programs to support 1,300 sales professionals at 211 loan production offices in 37 states. Provided hands-on management; developed plan for each project, managed design (copywriting, layout, type of item, printing) of all marketing materials (web sites, brochures, kits and customized presentations, premiums), oversaw distribution and traveled to offices to provide training to sales staff.

#### **Notable Accomplishments:**

- Launched new home services focused portal to improve market awareness, gain a competitive edge and increase lead flow. Successfully recruited 20+ affiliates to increase offerings and drive incremental revenues.
- Conceived and implemented program that established financial planners, accountants and lawyers as a source of referrals. Collaborated with IT to develop tracking systems and produced over 1,000 new leads in first 8 months.
- Launched corporate affinity program that gave sales representatives access to employees of large company's through integration of firm's services into a company's benefits package. Designed messaging, produced all marketing materials and trained nationwide direct sales force.

### MANAGER, MARKETING & COMMUNICATIONS

2000 – 2001

#### DATA CORPORATION / CHASE MERCHANT SERVICES ✧ MELVILLE, NY

*The nation's largest provider of payment processing solutions with over 3.4 billion transactions processed in 2002.*

Member of management team for Chase Alliance, a joint venture between Data and JPMorgan Chase. Managed all marketing communications for national markets (Travel & Entertainment, Retail and Direct) and small business lines including advertising, collateral development, channel marketing, public relations, web site management/content, product launches, direct mail, statement inserts, and special events. Oversaw budget of \$2.5M.

#### **Notable Accomplishments:**

- Initiated first ever advertising campaign utilizing national trade publications. Managed research and \$1M spend for 18 trade publications significantly increasing brand awareness for the nation's largest provider of payment processing solutions. Program's success led to repeating the program for the affiliate group resulting in program being halted due to an overabundance of leads.
- Assumed responsibility for marketing of affiliate program, revamped materials, implemented new tracking system and delivered 4 new major affiliates including Peachtree software, Intuit, BJ's, and Intel Financial Services.
- Developed improved procedures for Press Release development and approval that effectively cut development and approval time by 50%. Credited for the publication of multiple case studies in prominent trade publications.
- Served on Editorial Board Member of company newsletter distributed to over 75,000 businesses.
- Left due to aggressive recruiting by Home Mortgage (above).

## **BILL JATES, CONTINUED**

### **THE SAVINGS BANK ✧ GARDEN CITY, NY**

**1998 – 2000**

*One of the five largest publicly traded thrift institutions in New York State.*

#### **SENIOR MARKETING SPECIALIST - RETAIL BANKING ✧ 1999 – 2000**

Promoted from management position within the bank's mortgage subsidiary. Designed marketing materials and assisted with branch promotions, advertising functions, and special assignments in support of 37 branches. Challenged to design wide variety of marketing materials including statement stuffers, brochures, counter cards, posters, holiday club materials, newsletters and print advertising. Position required strong creative design and desktop publishing skills as well as the ability to manage multiple projects simultaneously from conception through printing and distribution.

##### ***Notable Accomplishments:***

- Eliminated communication disconnect between parent bank and its Mortgage Lending subsidiary by creating and editing a company newsletter distributed to all divisions.
- Delivered cost savings of approximately \$500 on each project by designing materials in house.
- Key Member of the bank's Image Committee, monitoring corporate image to ensure brand adherence.

#### **MARKETING MANAGER ✧ 1998 – 1999**

Recruited to develop marketing materials and programs to support 500 sales professionals nationally. Designed and executed successful advertising and marketing strategies (tradeshows, direct mail, mortgage/bank branch promotions, advertising, product sheets, application kits, broker kits, brochures) to increase sales.

- Increased sales opportunities by leveraging the relationship with the parent bank and its 37 retail branches.
- Reduced costs of mortgage application kits by 33% per kit by redesigning and managing kit production.
- Recognized for creating online marketing environment (flyer data base, procedures and regulations) to supplement hardcopy manual of procedures and flyers resulting in more efficient access and distribution to sales staff and clients.
- Managed dozens of print design and development projects for numerous Divisions and earned a solid reputation for creativity, cost containment and professionalism.

### **SALES SUPPORT**

**1996 – 1998**

#### **THE SAVINGS BANK ✧ MELVILLE, NY**

*Leading regional retail bank.*

Accountable for assisting 200+ sales professionals in southern region through product development, launches, and subsequent support.

##### ***Notable Accomplishments:***

- Worked in conjunction with outside firms to represent their products through the bank. Managed full product launch including developing product specifications, pricing, sales materials, and systems. Heavily involved in training sales force.
- Recognized for driving new level of cooperation between field personnel and corporate support resulting in region meeting sales targets.
- Successfully moved communications and support functions to online environment resulting in increased policy/product awareness, fewer inquiries and a decrease in costs and distribution efforts.
- Served as Chief Editor of In Brief and Corresponding Notes, the weekly/monthly on-line news bulletins facilitating timely and cost effective distribution of policy and product updates.

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## **EDUCATION**

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**BS, Business Administration, MIS Major ✧ New York Institute of Technology, Old Westbury, NY**

**Diploma in Digital Technology ✧ Suburban Technical School, Hempstead, NY**

#### **COMPUTER SKILLS**

- MS Word
- PowerPoint
- Excel
- Outlook
- QuarkXPress
- Photoshop
- Illustrator
- Acrobat