

KNOWN FOR

- An accomplished executive with over 35 years of experience in data analysis, marketing consulting, and finance.
- Founded and directed a full-service marketing consulting company, advising CEOs, CMOs, and others in several areas: predictive analytics, customer analytics, strategy development, market research, competitive intelligence, and data mining/warehousing.
- Managed analytics and research projects for a diverse base of Fortune 500, start-up, non-profit, and small organizations. Industries include cable, entertainment, and telecom.
- Conducted secondary market research projects for 15 industries, primarily deep mining public access free government data surveys.
- Specific expertise using SQL, SAS, Tableau, and Excel macros for data analytics.
- Managed group of eight analysts and administrative personnel.

EDUCATION

M.B.A.	University of Pennsylvania, Wharton School	Decision Sciences and Strategic Planning
B.S., magna cum laude	University of Missouri	Public Administration

EMPLOYMENT HISTORY

Infotech Marketing	Founder	1994-Present
U.S. West Enhanced Services	Manager of Marketing Strategy and Intelligence	1992-1994
ANR Freight System	Director of Marketing and Profit Analysis	1980-1992

EXPERIENCE/PROJECTS

Membership Analytics Consultant AARP (2007-present)	
AARP is the largest membership organization in the U.S. with over 35 million members. Mr. Walters provides membership analytics to senior management.	
Project Manager	<ul style="list-style-type: none"> • Served as project manager to obtain the data and merged data from various different systems to estimate overall product penetration across all silos for the first time. This metric was later used in the organization’s dashboard reporting.

<p><i>Membership Analytics</i></p>	<ul style="list-style-type: none"> • Profiles different groups of members to support acquisition and retention programs using SAS and Tableau. • Provides weekly and monthly model scores for over 75 different models. • Developed mixed media model using 19 media types to predict impact on new customer acquisition. The model iteratively dropped insignificant and multi-collinear variables before computing the final model.
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Marketing Consultant *BlueLine Rental (2003-2016)*

BlueLine Rental is a large construction equipment rental company. Mr. Walters served as the part-time outsourced market research/analytics advisor to the CMO and CEO.

<p><i>Marketing Analytics/ Strategy/ Forecasting</i></p>	<ul style="list-style-type: none"> • Programmed monthly Customer Dashboard reports in SAS and Excel including an Excel macro to distribute reports by email. • Produced numerous geographic expansion studies. • Forecasted annual construction spending by county. • Used logistic regression to guide strategy by differentiating between good stores and others. • Utilized Total Customer Analytics system with firmographics to develop detailed customer profiles by location for the East Region and obtained cloned prospect data for the sales force to call upon. This produced \$5 million first-year revenue. • Developed program to merge outside list information with internal customer data.
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Consultant *JPMorgan Chase (2014, 2016)*

Consulted in the Central Transactions Operations group. Mr. Walters evaluated ATM usage for multiple projects.

<p><i>Marketing Analytics</i></p>	<ul style="list-style-type: none"> • Developed and scheduled ETL jobs to productionalize cash forecasting and fulfillment for the Enterprise Cash Management System. • Predicted the number of customers by hour and day, analyzed detailed customer patterns, and forecasted/simulated ATM supply and demand conditions resulting in \$5 million annual savings. • Added external data to facilitate analysis. • Programmed all analyses in SAS, extensively using arrays, macros, and hash merges.
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Data Mapper <i>Banorte (2015 - 2016)</i>	
Banorte is the largest Mexican owned bank in Mexico. Mr. Walters mapped data to build a credit risk data warehouse.	
<i>Data Management</i>	<ul style="list-style-type: none"> • Mapped 1,000 attributes from six different systems to the SAS Banking Detailed Data Store and output datamarts. • Worked with IBM to provide end-users accurate decision-making data. • Automated various processes to efficiently conduct the project.

Reporting/Analytics Developer <i>Paloma Mobile (2013-2015)</i>	
Paloma Mobile was an Australian start-up social media app developer. Mr. Walters functioned as their primary data analyst to the CEO.	
<i>Marketing Analytics</i>	<ul style="list-style-type: none"> • Generated weekly and daily monitoring reports in SAS for internal and external use with their partners. This facilitated expansion into four Asian countries. • Performed ad hoc analyses of customer data.

Data Accuracy/Validation Consultant <i>PNC (2014)</i>	
PNC is a large regional bank. Mr. Walters led a data accuracy team in validating data for regulators and assisted with other teams.	
<i>Project Management/Data Accuracy</i>	<ul style="list-style-type: none"> • Led Data Accuracy team in validating customer sample data to mainframe systems. Developed BlueZone macros to automate screen print process. Mapped data lineage to source systems. Designed and implemented SAS programs to pull random account extracts for validation. Accessed five mainframe systems and one web system for validation. The total scope included five asset classes/lines of businesses and eight source systems.
<i>Data Validation</i>	<ul style="list-style-type: none"> • Assisted other data validation team members by designing SAS macros to validate five years of data. Additionally, automated various Excel components to eliminate cut-and-paste tasks. • Conceptualized, designed, and validated data quality rules for Pillar III for various asset classes.

Datamart Developer <i>Banco Santander (2011)</i>	
Banco Santander is a Spanish bank with U.S. operations in the northeast. Mr. Walters designed, developed, and built a customer datamart.	
Data Management	<ul style="list-style-type: none"> Investigated available data sources and performed ETL operations to load data into the customer datamart.

Primary Research Consultant <i>Storeroom Solutions (2010)</i>	
Storeroom Solutions provides outsourced storeroom management. Mr. Walters served as a primary research consultant to the CMO.	
Primary Market Research	<ul style="list-style-type: none"> Designed and implemented a B-to-B primary research survey to ascertain the buying process, assess company awareness, and discover major buying motives.

CRM Consultant <i>Sturm Financial Group (2009)</i>	
Sturm Financial Group operates a regional banking chain. Mr. Walters served as a customer relationship management (CRM) consultant to the CMO.	
CRM Consultant	<ul style="list-style-type: none"> Analyzed customer surveys by location with comparisons to other locations and other banks.

Research Analyst <i>Caterpillar Tractor (2008)</i>	
Caterpillar Tractor builds construction and other equipment. Mr. Walters researched a specific expansion product category.	
Secondary Marketing Research	<ul style="list-style-type: none"> Utilized secondary market research to develop forecasts based on competitive and market dynamics.

Survey Analyst <i>Eli Lilly (2007)</i>	
Eli Lilly is a worldwide pharmaceuticals company. Mr. Walters analyzed employee feedback surveys.	
Survey Analysis	<ul style="list-style-type: none"> Produced cross-tabs and visual analytics of employee surveys. Utilized text mining for open-ended questions.

Survey Analyst <i>Abbott Laboratories (2007)</i>	
Abbott Laboratories is a worldwide pharmaceuticals company. Mr. Walters designed and analyzed employee feedback surveys.	

Survey Analysis

- Designed the employee survey. Produced cross-tabs and visual analytics of the results. Utilized text mining for open-ended questions.

CERTIFICATIONS AND TRAINING

Certifications

- SAS Certified Professional (2000)

Courses Taught

- Data Analytics for Business – Currently mentor students in Excel, Tableau, and SQL
- Principles of Environmental Scanning
- Marketing Management
- Public Relations/Marketing Research & Measurement
- Value Driven Decision Making
- International Marketing
- Competitive Analysis
- Disruptive Technologies
- Technology and Society

PUBLICATIONS AND PRESENTATIONS

Selected Publications and Project Reports

- **Walters, Tim** (Sept., 2001). On-Line Market Research: Using Technology to Improve Your Information. Denver, CO: Advertising and Marketing Review.
- National Law Enforcement and Technology Center (2000). Understanding Wireless Communications in Public Safety: A Guidebook to Technology, Issues, Planning, and Management. Denver, CO: U.S. Department of Justice. Served on Advisory Board.
- **Walters, Tim** (1998). Creating Inferred Data Using SAS. Oakland, CA: Proceedings of the 6th Annual Western Users of SAS Software Regional Users Group.
- **Walters, Tim** (1997). Incorporating External Data Into the Datawarehouse. Cary, NC: SAS Users Group International 22nd Conference Proceedings.
- **Walters, Timothy C.** (1995). Market Oriented Strategic Management for Motor Carriers. Washington, DC: Proceedings of the Transportation Research Forum, Volume XXVI. Note: Won Best Paper Award from the Regulated Common Carrier Conference.

Selected Presentations

- **Walters, Tim** (2012). Automating SAS Integration Technologies via Excel. Presentation to the Denver SAS Users Group.
- **Walters, Tim** (2008). Building a Marketing Dashboard Using Excel and SAS. Presentation to the Denver SAS Users Group.



- Kremer, Joe and **Walters, Tim** (2006). How to Speak CFO: Making the Business Case for Communications. Presentation to the Public Relations Society of America Rocky Mountain Chapter.

Op-Ed and Other Presentations

- **Walters, Tim.** (1997). Entering the Local Loop. Wireless Week, April 14th, 1997.