

ERIC S. FLEISCHER, MBA



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ANALYTICS, INNOVATION, AND DIGITAL TRANSFORMATION EXECUTIVE

Performance-driven, dynamic leader who navigates organizations to increased levels of growth, profitability, and industry leadership through strategic insight, high yield processes, and deeply engaged teams. **Transitions fluidly between strategy, process, and technology**, to develop a complete execution roadmap. Champions collaboration among teams and cross-functional leaders. **Systems thinker** who thrives on problem solving and stepping up to complex challenges that others will not attempt. Empowering style that builds trust. Adds value in taking a company to the next level of performance and customer engagement.

SIGNATURE STRENGTHS AND COMPETENCIES

- Delivery Executive for Large Programs
- Learning and Development
- Business Led Full Stack Development
- Digital Transformation Evangelist
- Change Management
- Agile Planning Skills
- Business Intelligence & Forecasting
- Lean Process Improvements
- Robotic Processing Automation
- Business Process Redesign

EXPERIENCE

TD Ameritrade / Schwab, Southlake, TX (NASDAQ: AMTD)
Managing Director-Business Insights and Transformation

2012 – Current

Lead a department composed of Business Intelligence, Workforce Management, LEAN, Full Stack Application Development, Systems Strategy, Human Capital Development, and Enterprise Digital Business Automation for the TD Ameritrade Institutional Business, responsibilities include:

- Develop, deliver and support 45 operational Tableau dashboards and over 2,000 annual analytic requests
- Develop and deliver over 100 web-based applications utilizing agile methodology
- Roll out and sustain Lean service model for 1,100 associates. Reducing the Institutional Expenses per Client Assets (EOCA) by 45% or saving \$110M since roll out
- Develop the operational strategies that maintain service levels while navigating a \$4B acquisition in an environment of +20% YOY growth
- Deliver IBM's BPM tool across the enterprise, while leading Scrum Masters, Project Managers, Product Owners, Designers, and Business Analysts, creating automation and workflow in 80% of the manual processes

TD Ameritrade- *A leader in investment services, serving 9 million clients and 7,000 independent financial advisors by providing financial products, technology platforms, and world class services through branches and call centers. Total client assets of \$1.3 trillion resulting from a 20% increase YOY and a market cap of \$26 billion. (www.amtd.com). Schwab acquired TD Ameritrade on October 6, 2020.*

**Fidelity Investments- Westlake, TX (Privately Held)
Director-Lean Operations Excellence****2007-2012**

Deliver Business Process Redesign, LEAN, and Business Intelligence for Fidelity's Pricing and Cash Management Services (FPCMS) Group, responsibilities include:

- Implemented Tableau Dashboards to 1500 associates to drive up productivity by 4% annually
- Optimized accounting and cash management processes by eliminating non-value waste and then automating with agile methodology, saving the department \$20M in labor costs
- Built a workforce management tool that forecast demand and insured correct staffing for 1500 associates saving \$1M in annual vendor costs

***Fidelity**-The nation's #1 record-keeper of 401(k) retirement savings plans and a leading provider of 403(b) retirement plans for not-for-profit institutions. Fidelity provides defined contribution, defined benefit, health and welfare and stock plan services to nearly 23,000 employers with \$7 trillion in customer assets under administration. (www.fidelity.com)*

**Citigroup-Irving, TX (NYSE: C)
Vice President-Process Reengineering****2001-2007**

- Coordinated with senior leadership team, processing vendors, compliance group, and infrastructure teams to review, catalogue, and enhance 23 processes annually utilizing Six Sigma methodology; resulting in automations, saving the department approximately \$250M
- Managed PEGA Rules Process Commander workflow tool implementation; allowing for real-time reporting, quantitative capacity planning, and management of all service level agreements. Project has an annual save of \$1.14MM
- Launched a Contact Data Warehouse to deliver the platform necessary to conduct ongoing contact analysis and management activities, resulting in benefits of \$40MM
- Drove organizational reviews and realignment to build tighter integration across functions, clarification of roles, and flexibility to changing needs of business

***Citigroup**-A leading global bank with approximately 200 million customer accounts and does business in more than 160 countries and jurisdictions. Citi provides consumers, corporations, governments, and institutions with a broad range of financial products and services, including consumer banking and credit, corporate and investment banking, securities brokerage, transaction services, and wealth management. (www.citigroup.com)*

BACKGROUND**MBA, Management, Texas Tech University, Lubbock, TX
BA, Marketing, Texas Tech University, Lubbock TX****Security Industry Institute – Wharton/University of Pennsylvania**
*SIFMA sponsored 3-year executive development program for financial professionals***Previous Experience at Accenture Consulting as an Electronic and High-Tech Analyst****Former Mayor, Mayor Pro-Tem and Councilman for Newark, Texas**