

EXECUTIVE PROFILE: David Robertson, Principal

David Robertson delivers a unique blend of creative thinking, analytical and organizational skills to initiate and activate solutions – bringing ideas, people, and projects together, for transformation and growth. With nearly two decades of proven results in the consumer products, business services, health/wellness, and graphic communications industries, David has been a key strategic and tactical contributor, driving achievements of the highest business priority for brand growth, sales, product/service innovation, communications, operational efficiency, continuous improvement, and organizational transformation. He has consistently demonstrated his integrity, adaptability, resilience, and “can-do” attitude in building teams and systems for responding to business challenges and growth opportunities. As a catalyst for growth, David has a passion for making a difference and moving it forward.

Beginning his career in the consumer products and graphic communications industries, David quickly demonstrated his value as a member of the brand and product management team, within Corning Consumer Products Company. He was a key member of the implementation team that partnered with a leading global branding and design agency to successfully execute a \$1.5 million brand identity launch, for 250+ national and international products. Demonstrating a willingness to take the initiative from the start, he quickly identified opportunities for improvement and implemented a quality control process and vendor management practices, increasing deliverable quality and customer satisfaction, while decreasing cycle times and costs. Recognized as a collaborator and creative problem solver, David was recruited to an award-winning branding and design agency, by its founder, to grow and transform the business. Within the first year, he had far surpassed account goals and increased billing by 145%, executed a formal development strategy and promoted teamwork. David was recruited back to Corning Consumer Products Company with a promotional opportunity as a team leader for graphic communication resources, launching new products and promotional sales programs through retail, food, and wholesale channels including Wal-mart, Kmart, BJ's, Sam's Club, Target, Macy's, and Wegmans.

After the sale of the company to a private equity firm, David seized the opportunity, during a time of transition, to expand his competencies with the latest digital communications technology, tools, and practices for a competitive edge in the growing e-marketplace. Declining an offer from Canon, USA to join their marketing/sales team, David's strong ties to the Rochester community led him to pursue a career in upstate New York. He was quickly recruited to an educational nonprofit institute and led the creative marketing services team. Leveraging an ever-expanding portfolio of marketing, sales, communications, and general business management skills, he proved time and again his creativity and flexibility in responding to financial and resource challenges with the ability to “wear many hats” in the effort to meet and exceed business goals, while successfully increasing brand awareness and status.

In 2004, David welcomed a transition to the dynamic (and growing) health care industry and the opportunity of a newly created business development and marketing leadership role, within the Greater Rochester Independent Practice Association – a \$310 million physician/hospital partnership. Tasked with developing new revenue streams and reversing market share losses for a commercial health insurance brand, David quickly distinguished

himself as a progressive thinker and leader that contributed new ideas, had the courage to question the status quo, and an ability to build consensus. In the first year, he re-energized the health insurance brand with a \$500,000 integrated marketing/sales strategy, reversing the market share decline with a 158% increase in brand selection. He forged collaborative relationships with peers and strategic partners creating a new business portfolio, operational resources, and distribution channels. After a significant change in the market, David was recruited to Excellus BlueCross BlueShield – the largest nonprofit health plan in New York – as a sales manager with 11 key national accounts. Challenged with a turnaround situation, David quickly resolved issues and achieved 100% retention in year-one while increasing satisfaction scores by 19-points to an average of 95+%, and beating sales goals despite aggressive national competition and price increases. David developed and drove a solution-oriented selling system for accounts based on best practices, account-specific strategies, and data-driven tactics, supported by a team of specialists.

Most recently, David was a change management coach and quality champion within the strategic planning and transformation group, overseeing a \$75+ million mission-critical project portfolio for Excellus BlueCross BlueShield. As a trusted advisor to business and technology leaders, he monitored alignment between the marketing/sales strategic project portfolio and overall enterprise strategy reporting performance to the corporate governing board. Recognized as an effective leader and communicator, David's supervisor nominated him to the corporate leadership program as part of a cultural transformation effort. Prior to this, David responded to senior leadership's call for innovation, by volunteering for a newly formed strategic marketing and innovation team charged with developing new health/wellness product and service concepts. He led the development of an enterprise innovation management process, strategic roadmap for the consumer-driven product portfolio, transparency technology, and value proposition for the national sales division.

In 2008, David was recognized as a Rochester Business Journal *Forty Under 40* honoree based on professional achievements and community volunteer leadership. David is a member of the American Heart Association Board of Directors, Rochester Region and PRALID – an \$8 million regional nonprofit helping individuals with disabilities. In addition, he is a volunteer leader and donor to the Rochester Advertising Council, United Way of Rochester, George Eastman House, and Honor Flight. As an enthusiastic connector with exceptional interpersonal skills, David has established an extensive network of regional and national connections. David's career has spanned virtually all aspects of business development and management, including brand strategy, product/service innovation, marketing, sales, communications, operations, continuous improvement, program management, as well as technology integration, organizational transformation, team building, and leadership. He lives in Pittsford with his wife, Suzanne, and two sons.

Education and Certifications

- Certified Project Management Professional (PMP)
- Certified Lean Six Sigma Green Belt
- Rochester Institute of Technology: BS in Photographic & Digital Communications (High Honors)
- Keuka College: BS in Business Management and Marketing (Dean's List)

Honors and Recognition

- Rochester Business Journal *Forty Under 40* Honoree
- Corning Incorporated: Prism Performance Award
- Forward Branding: Agency Top Performer Award
- American Corporate Identity: Award of Excellence