
SUMMARY

Business Analyst with an entrepreneurial focus on discovering business opportunities.

Vertical-industry expertise: K-12 and higher education, emerging technologies, financial services, fitness and wellness, government, health care, investment banking and non-profit.

CORE COMPETENCIES

- Exceptional research and analytical skills—ability to assimilate and interpret various sources of information quickly, recognize patterns and draw conclusions.
- Subject matter expert in the e-messaging collaboration and social computing markets.
- Articulate cross-competency writer, strong public speaker and solid communication skills.
- Strong management skills, with emphasis on global, matrix reporting structures.

EXPERIENCE

Credit Suisse

New York, NY

Business Analyst (Consulting Project)

Sep–Dec 2009

Researched and documented internal and financial services instant messaging systems used by the bank, with an emphasis on global records management. Gap analysis and recommendations on exposure mitigation was at the core of this consulting engagement.

- Presented findings to global stakeholders—areas of cost containment identified.
- Delivered 80-page composite report that aligned silos of disparate systems in lay language—laid foundation for allocating resources based upon criticality of exposure risks.

Grey Consulting

Kent Lakes, NY

Founder, Principal Analyst

2005–present

Built boutique research and advisory firm, which focuses on the business and technology operations of electronic messaging and social media. Services include marketing and educational white papers, Webinars and on-stage presentations, on-site spot advisory and long-term consulting engagements. Clients include Akonix, Cisco, Credit Suisse, Deloitte, Deerfield, EMC, GeM Solution, JupiterEvents, Mirapoint, Symantec, X1 Technologies and ZDNet.

Gartner, Inc.

Stamford, CT

Research Director (2000 – 2005)

1996–2005

Lead analyst on electronic messaging. Coverage included compliance, data security and privacy, outsourcing, email archiving, records management and instant messaging. Deliverables included qualitative research, enterprise and vendor consulting and conference presentations.

- Developed model to quantify the operational cost of an enterprise email system—continues to generate average annual revenue of \$500,000 for Gartner Consulting.
- Partnered with Sales to deliver advisory services to prospects and renewals—won an average of ten significant new clients, renewals or upsells per quarter.

Maurene Caplan Grey

Gartner, Inc. (continued)

Project Leader (1999 –2000)

IT project leader for Gartner’s CRM implementation.

- Glued relationship between internal cross-functional teams and external consultants—scoping requests aligned to budget and resources; deadlines were met.

Director, Business Services & Support (1998 – 1999)

Led desktop services, help desk, break/fix, electronic messaging and asset management.

- Built cohesion across disparate groups, which had been operating in silos—morale improved.
- Streamlined departmental workflow—50% improvement in work order completion time.

Director, Electronic Messaging (1996 –1998)

Direct operations and business accountability for global messaging systems. Responsible for \$3M budget.

- Consolidated five email systems on three operating systems and two calendaring systems onto one unified platform—reduced capital expenses.
- Restructured localized, autonomous operations into a centrally managed, shared-services model—reduced capital expenses.

United Parcel Service

Mahwah, NJ

Manager, Electronic Messaging (1990 –1996)

1990–1996

Direct operations and business accountability for global messaging systems.

Deloitte

New York, NY

Writer/Editor

1981–1990

INDUSTRY INVOLVEMENT

- Keynote speaker, Collaboration and Records Management (NVA chapter ARMA, 2009)
- First-round judge for the 2009, 2008 and 2007 CODiE awards (produced by the SIIA)
- Listed in *100 best analyst bloggers* 2008 and 2007 and *100 best analyst twitters* 2008 (published by Technobabble 2.0)
- Contributing author *Collaborative Environment Workplace Issues* (ARMA , 2007)
- Research fellow and advisory board member, Society for New Communications Research, (2006-2007)

EDUCATION

- BA, summa cum laude, communications, University of Pittsburgh

COMMUNITY AFFILIATIONS

- Westchester Networking Organization, founding member
- Rivertown Networkers, advisory board member