DAVID M. THOMPSON

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CHIEF RESEARCH OFFICER / MANAGING DIRECTOR

Specializing in consumer insights, user experience (UX) and brand and strategy development; an unwavering passion for client success, embracing best practices and new technology to drive goal attainment.

EXECUTIVE SUMMARY

- *An intuitive research professional, team leader and executive strategist offering expertise in insightful thought leadership and innovative research. Delivers significant collaboration across all levels of the organization and develops workstreams that increase productivity through research automation and creative problem-solving.*
- *A self-starter who builds and translates comprehensive datasets into well-developed summaries, reports, and presentations to drive business decisions and market growth. Developed mastery creating and managing large-scale and complex syndicated research platforms.*

CORE PROFICIENCIES

Creative Thinking | Influential Leadership | High Impact Business Strategies | Applying New Technology to Research

Dynamic Storytelling & C-Suite Presentations | Strong Research Networks | Account Management | Entrepreneurial

Expertise in Wealth Management, Banking, Insurance, Payments and Luxury Markets | Quantitative & Qualitative Methods

Survey Design | SPSS, Qualtrics, Powerpoint, MarketSight | Conjoint, Max Diff, Discrete Choice, Key Drivers Analyse

PROFESSIONAL EXPERIENCE

Managing Director, Affluent Market Practice | Phoenix Marketing International | Rhinebeck, NY 2003 to 2020

Top 25 Marketing Services and Research Firm.

Developed and directed initiatives for industry-leading syndicated and custom investment research platforms within financial services and wealth management across North America and Europe. Full accountability for revenue, expenses/spend, new business development, and sustainable growth. Provided motivational and supportive leadership to staff and project teams. Served as a subject matter expert and trusted advisor to clients for product, channel, competitor, communications, and marketing strategies.

Selected Accomplishments:

- ***Created and directed the Global Wealth Monitor, an industry-leading syndicated and custom consumer research platform for financial services in North America and Europe.*** *Full P&L and staff management responsibility. Opened new markets in Canada and Europe. Clients included the leading wealth management, luxury, banking, insurance, asset management and credit card companies.*
- ***Generated over $20MM in syndicated and custom research sales*** *through research platforms.*
- *Using research-generated data and insights,* ***engaged financial services and luxury market clients in the development of strategic plans i****nvolving customer service and user experience, product development, distribution and branding.*
- ***Developed new tech-driven products****, including FA-CX, a customer experience benchmarking and dashboard platform; and the Active Wealth Pulse, an advanced geo-targeting application for market planning and opportunity discovery.*

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Vice President Financial Accounts | NFO WorldGroup / InterPublic Group | Greenwich and NYC ____1998 to 2003

NFO WorldGroup (now TNS) was the third largest marketing research firm worldwide and was a subsidiary of InterPublic Group.

Spearheaded syndicated and custom research in affluent and high net worth markets for multi-national clients across wealth management, banking, and insurance sectors. Supervised staff and instilled best practices, compliant research procedures, and client service expectations; provided ongoing training/development ensuring highly productive, knowledgeable, and self-sufficient teams.

Selected Accomplishments:

- ***Led InterPublic team that supported all quantitative research projects for a $200MM advertising contract with Bank of America.*** *Responsible for ad and brand positioning concept testing and in-market ad testing (multi-media), new product concept testing, and customer experience CX monitoring.*
- ***Delivered program management and continuous improvement with the Affluent Market Research Program*** *(the leading syndicated affluent study in the U.S.);* ***Generated over $4MM in sales from new as well as existing clients.***

Director Strategy & Marketing | CIGNA Financial Advisors | Bloomfield, CT______________________1994 to 1998

Division of CIGNA that marketed retirement, estate planning and corporate-owned life insurance to HNW consumers and business owners.

Led market research, predictive analysis, client segmentation and modeling.

Selected Accomplishments:

- ***Completed market segmentation and concept testing research*** *to identify and quantify consumer markets for new product and service offerings in retirement and estate planning arenas.*
- ***Developed marketing plans for financial advisors*** *and annuity wholesaling operations.*
- ***Integral member of division effort to transition from reactive to high impact, proactive marketing and strategy platform.*** *Efforts included development of comprehensive demographic profile of entire book of life and annuity clients, client segmentation, and predictive analytical model for new business development.*

Other Experience:

- *Rynecki/Thompson, Inc. - VP/Principal; client consulting; business development; staff management; Healthcare and CPG vertical markets focus*
- *Aetna Life & Casualty (Commercial) – Manager, Strategy Development Group; marketing; communications; sales strategies.*

TECHNICAL SKILLS

Microsoft Desktop Applications , SPSS, SQL, Hubspot, Qualtrics

PROFESSIONAL DEVELOPMENT AND TRAINING

Continuous professional training related to Management, Marketing Research, Marketing, and Quantitative Analysis

EDUCATION & INTERESTS

Master of Arts, Business Management– University of Hartford, West Hartford, CT

Graduate Studies, Psychology – Central Connecticut State University

Bachelor of Arts, Music – Alfred University, Alfred, NY

Amateur musician (piano)

Volunteer: Habitat for Humanity