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Objective: An account or managerial position in customer service or sales/support.

## QUALIFICATIONS

Extensive practical experience in these key areas: business management & operations – computer application troubleshooting – COPC – crisis management – customer service – distribution – employee motivation and relations – inventory control – ISO internal auditing – Microsoft Office software suite – office management – organization and planning – personnel administration & supervision – policies & procedures – problem solving – project management – public relations – sales management – script development – telemarketing/telesales/lead generation – training – web design, development and management.

## PROFESSIONAL HIGHLIGHTS

### • Sutherland Global Services, Pittsford, NY August, 1993-Present

#### Account Manager/Consultant May, 2001-Present

High-end business-to-business sales and lead generation to “C” level contacts primarily for companies in finance and telecom industries including GE Capital/IT Consulting and Commercial Equipment Finance, Equifax, Avaya and Covad.

#### Program Supervisor/Manager May, 1997-April, 2001

Program supervisor or manager with shared bottom-line responsibilities for a variety of inbound and outbound lead generation and sales programs for companies including Xerox, Eastman Kodak, and Microsoft. Team sizes ranging from 3 to 40 people. Several cross-program duties, ensuring overall quality, productivity employee morale and client satisfaction. Directly wrote or assisted with script development for multiple phases into specific vertical markets. Responsible for creating and maintaining computer based records (metrics, personnel information, daily through monthly program activity, client-required data, etc.). Xerox product and skills trainer for 250+ project employees. Internal Sutherland consultant for Nautica, Olympus America, and Starband programs. Collaborated on program/division-wide incentives. Aided with computer troubleshooting as necessary. Developer of ISO program documentation and guarantor of compliance. Internal senior level ISO auditor, (1997-2003), COPC trainee.

#### Marketing Representative/Team Leader August, 1993-April, 1997

Outbound telephone lead generation work on computer hardware and software programs for Digital Equipment Corporation, Xerox, and other major firms. Top performer for most projects, exceeding targeted goals and gates.

### • Freelance computer programmer, assorted part time and temporary positions August, 1990 -July, 1993

### • Richland Industries, Rochester, NY 1981-1990

#### Operations Manager 1989-1990

Responsible for operational/administrative functions relating to order fulfillment and processing for nine stores in Rochester, Buffalo and Syracuse. In charge of office staffing for the department. Primary customer service contact – optimized record keeping systems – implemented cost cutting procedures – worked with internal software developers to enhance performance – corporate trouble shooting

#### Retail Store Manager 1988-1989

#### Distribution Manager 1984-1988

#### Salesman and Retail Store Manager 1981-1984

## EDUCATIONAL BACKGROUND

- Sutherland University (company training) 2-8 hour courses: Coaching - Discipline/Documentation - Discrimination - Financial Forms Interviewing - Leadership - Managing Poor Performance. COPC Call Center Standards (2001, 32 hours). Career Advancement Program (2009, 30 hours).
- Nazareth College, Rochester, NY Management Training, 1998 (20 hours)
- Excel Training, Inc., Rochester, NY ISO 9000 Internal Auditor Training, 1997 (10 hours with additional follow-up)
- Great Lakes Management, Rochester, NY Management Training Seminar, 1988 (40 hours)
- Alfred University, Alfred, NY Bachelor of Science- Ceramic Engineering, 1981

## PERSONAL INTERESTS AND HONORS

- **Philately** (stamp collecting)- Nationally accredited judge, international exhibitor and presenter. Author of numerous articles and columns. Active in local through international organizations in a variety of leadership positions:
  - American Philatelic Society (48,000 members): Chapter Activities Chairman responsible for 600+ stamp clubs (1997-present)
  - Cover Collectors Circuit Club (25,000 members): Publicity Chairman, Webmaster (1988-present)
  - Int. Society of Worldwide Stamp Collectors (500 members): President (1994-97), PR Director (1990-94), Webmaster (1997-2005)
  - Rochester Philatelic Association (85 members): President, VP, ROPEX Stamp Show Chairman, Webmaster (1993-present)
  - Washington 2006: Media Communications Chair responsible for worldwide PR and exhibition promotion (2001-2006)
  - New York 2016: Media Communications Chair responsible for worldwide PR and exhibition promotion (2010-present)
  - Stamp Camp USA: Vice President and Board member. America's premier youth philatelic educational group. (2010-present)
- **Greece Choral Society**- Treasurer and librarian (1983-present). Tour director and organizer for two European concert trips.
- **Webmaster** for several personal sites, non-profit organizations and creator of the web's largest amateur wrestling reference site.
- **PC Consultant**- troubleshooter for Windows based personal computer software and hardware.
- **1996 Olympic Torch Bearer**- selected for outstanding community service by Coca Cola.

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## Summary of Programs Called On, Supervised or Managed at Sutherland Global Services, 1993 - Present

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### **General Qualifications**

Very strong verbal and written skills. Excellent Microsoft Office background, especially with Excel. Management and supervisory experience. Script development. Task and goal oriented. Former ISO internal auditor. PC software and application troubleshooting. Outside Sutherland experience with local, national and international public relations; special event promotion and logistics; webmaster for several organizations and personal web sites.

### **August 1993 to March 1997**

I spent the bulk of my first four years with Sutherland as a lead rep or team leader working of a variety of lead-generation programs. Major clients included Xerox, General Electric, and Digital Equipment. These were mostly for computer and computer related products, including servers, workstations, mid-sized and mainframe systems, printers and assorted peripherals, networking, and Internet/Intranet needs. I assisted teammates as needed with technical assistance and calling strategies, as well as the program manager with computer forms and spreadsheets to track job performance data.

### **Xerox Agent: April 1997 to January 1999**

This was a lead generation program presenting new equipment (copiers, printers, and fax machines) options to current and potentially future Xerox customers. Leads were then elevated to local Xerox representatives for follow-up. I supervised a team of 10-15 employees that typically placed 2<sup>nd</sup> or 3<sup>rd</sup> out of six in leads generated, including over many destabilizing months. I am proud of those team members who graduated and moved on to continue successful careers at Sutherland. My supervisory and training skills were utilized to the fullest, as I was additionally responsible for new hire training "indoctrination" into Xerox as a corporation, their products and services. My computer competency allowed me to continue improving internal reporting to better the entire program

### **Kodak Adapter: February 1999 to January 2000**

I successfully managed the year long Kodak Adapter Recall Program from process review through its conclusion. Approximately 12,000 adapters were exchanged through the duration of the program, with a total loss of 5. Requirements were different from programs in the past in several ways:

- staffing on a 7x16 schedule
- setting up a fulfillment center at the warehouse
- working extended hours, including weekends
- managing an overflow group of employees

Challenges faced and overcome with this program were many, including:

- A rotating inventory reaching \$750,000 at its peak
- Complying with governmental regulations set forth with the Consumer Protection Safety Council
- True customer service, especially dealing with a variety of customers and their specific problems and complaints
- Training some new employees with minimal skill sets

### **Nautica: October 1999 to November 1999**

I was part of a launch team on a new web initiative for Nautica.com, bringing the clothier a web presence for the Christmas holiday season. Plans were for running a 7x24 customer service center for customers with questions about products showcased online and taking them through the sales process, and if need be, return process. Sutherland's ezCRM solution was to be the foundation for the program. Due to internal Nautica difficulties, the program was abandoned on their part before implementation.

### **Xerox 6<sup>th</sup> Sense & FSMA Program: November 1999**

This program ran concurrently with the conclusion of the Kodak Adapter program, using a common group of three employees under my management. Two thousand Xerox network copier/printer customers were contacted about two opportunities. The first was the installation of a device which when implemented would automatically phone a local repair facility warning of needed maintenance. The second dealt with an all-inclusive servicing and marketing agreement for their current equipment. The program resulted in an 11.5% lead rate, exceeding the expected 8%. Our successful efforts were recognized in internal Xerox marketing magazines.

### **Microsoft Press: December 1999 to March 2000**

I managed a three-month trial sales program dealing with the variety of technical books offered by Microsoft supporting their various applications. Emphasis was made on their line of Windows 2000 server publication titles,

as Windows 2000 was being released in late February/early March. While eventually Microsoft allowed us to sell their entire line of publications, a \$250 bundled library of publications was product we sold the first two months. These cold-call sales to owners of Microsoft NT business operating systems were disappointing, with revenue about 1/3 of Microsoft's expectations. This was partly due to poor press about migrating from NT to Windows 2000 and the continual postponements of the release date for Windows 2000. Despite this, over 220 bundled libraries were eventually sold, along with an equal number of individual titles.

#### **Olympus America: January 2000 to February 2000**

Over a seven-week period I worked at Olympus America's U.S. headquarters in Malvern, Long Island. Sutherland had been managing a call center there since the previous October. I traveled out by air Monday mornings and returned to Rochester late Thursdays, coming back to Irondequoit on Fridays for the Microsoft Press program. The goal of this four person team was to review current processes and procedures, streamline operations, and increase overall efficiency of the call center. My area of concentration was in the quote process of medical endoscopes: RFPs would be initiated by customers or salesmen through on-site field visits, priced by the call center quote staff, and returned to the salesman and customer accurately and in a timely manner. Quotes ranged from a few dollars to several million dollars each, many of which had special pricing options/discounts associated with them. My initiatives resulted in increased consumer and salesman confidence in Olympus and the Sutherland operation.

#### **Microsoft ISP/EAP: April 2000 to March 2001**

At the conclusion of the Microsoft Press program I became the database and warehouse manager for the Microsoft ISP program. Twelve reps would call a variety of ISPs around the country and invite them to attend Microsoft sponsored seminars around the country. I was originally brought in to manage client reporting. As the program evolved, an incentive premium for attending the seminars was introduced- a \$4,000 25 seat copy of Advanced Server 2000. These were brought in, assembled with a variety of pamphlets and flyers, and shipped out to either the seminar sites or individual attendees meeting qualification requirements. I developed all processes and procedures for this in conjunction with the client with a dedicated staff of six. In all, 1,200 software packages were handled with a retail value of \$4.8 million dollars without a loss on our part. I took over full management of the program when the current manager left the company in June 2000.

#### **HR One: September 2000 to April 2001**

GNeil, parent company of HR One, was a 12 year old company dealing in hard goods and software for the human resource niche. HR One is a spin-off company, marketing an online version of GNeil's software under an ASP model. It was originally intended to be exclusively an inbound program, with reps answering calls from potential customers responding to HR One mail, email and fax initiatives. It evolved into an outbound campaign calling those same people. The program started with 5 reps, and grew to eight. After the client made several marketing changes with input from myself and the team (different pricing models, various target-market email and mail campaigns, etc.) the program stabilized and saw an increase of sales inline with the client. HR One cancelled the program due to their budgetary and cash flow restraints.

#### **Starband: May 2001**

Based in Virginia with operational offices in Atlanta, Starband is the nation's leading two-way satellite ISP to consumers throughout the US. Sutherland's initiative with Starband began in November of 2000, offering inbound customer sales and support as well as installation technical help desks. I was brought in as a technical specialist, calling their partner Radio Shack locations in a "Mystery Shopper" capacity, delving into the knowledge of store managers about the Starband product. I tweaked the existing questions and related scoring system to determine meaningful benchmarks regionally and nationally at both franchise and corporate stores. The Starband program was cancelled as the company moved all operations internally.

#### **GE Capital- Financing: June 2001 to September 2001**

GE Capital, the financial division of General Electric, has run several programs through Sutherland. This lead-generation program contacted controllers and VPs of finance in small to medium sized businesses to see if GE's financial services could be of use. I was asked to assist the team of 8 account reps to help reach phone and lead targets, and received a territory of my own in the south supporting five GE field reps. The program was eventually scaled back to three reps and concluded October 1, as client funding was no longer possible. I generated 78 leads with a total value of \$577 million in potential refinancing.

#### **HiddenMind: October 2001 to February 2002**

Based in Cary, NC, HiddenMind develops software which enables users to access mainframe and client/server applications by wireless handheld devices online or offline. A team of 5 senior Sutherland reps supported nationwide marketing efforts on a territorial basis. I supported two HiddenMind field reps in the south and west developing leads for their products.

**GE Capital- IT Solutions: March 2002 to September 2004**

GE Capital- IT Solutions, the information technology arm of General Electric Capital, has been outsourcing its consulting services and filling personnel needs for the IT industry since the early 1990s. With the acquisition of several IT service businesses in the US and Canada, GE came to Sutherland to grow this services business through high-end lead generation calls and supporting their field representatives. Phone presentations were made to CIOs and VPs of IT across a spectrum of vertical markets in Chicago, Cleveland, Cincinnati, and Minneapolis/St. Paul. I developed two especially large leads. One was the Chicago Transportation Authority, looking to fund a billion-dollar acquisition of rail cars and related equipment for renovation of "The Loop." The other was with Enterprise Rent-A-Cars, which was looking to finance a portion of their new car fleet for the following year worth in excess of \$500 million.

**Avaya: October 2004 to November 2005**

Avaya is a world leader in voice and data communications. A spin-off from AT&T and then Lucent Technology in 2000, Avaya is perhaps best known for its telephony, voice and data solutions for businesses large and small, including the newest voice-over-IP (VoIP) technology. This was a lead generation program finding potential leads for Avaya territory sales representatives and their channel business partners. Conversations were held with people of various levels of responsibility, from hands-on technicians to CIOs, learning about their overall business objectives and technology needs, and fitting Avaya products and services with them. Of the 100 or so leads generated, the largest lead closed for \$135,000 in revenue.

**Macromedia: December 2005**

Macromedia is a software company that primarily produces applications for web development and Internet interfacing. They are most noted for their Flash application, bringing animation to web sites. This was a sales position selling various web application development tools, including Dreamweaver, to prospective customers. Unfortunately shortly after joining the program Macromedia was acquired by Adobe and Sutherland's program was cancelled pending a post-merger re-evaluation of Adobe's needs.

**Covad: January 2006 to May 2008**

Based in San Jose, California, Covad was a nationwide provider of high-speed Internet access through DSL, T1 and bonded T1 technologies, as well as VoIP services. I was hired initially as part of a VoIP sales specialist team making cold-calls and taking inbound inquiries from prospective business customers in small office/home office (SOHO) environments. In early 2007 the focus of the program shifted almost exclusively to cold calling into businesses looking for Internet access. From October, 2007 to May 2008 I was assigned to an inbound help desk for Covad's largest channel partner, Telarus/Shop for T1, assisting reps with pre-sales needs and order/entry.

**Equifax: May 2008 to Present**

Equifax is one of the world's largest independent credit rating companies and is based in Atlanta, Georgia. I was brought in as a team lead to assist with program growth and development, especially tapping into my Excel reporting skills. I have worked on both the lead gen aspect of the program, calling businesses requesting them to report their account receivables regularly to Equifax, as well as on sales programs for their line of financial products. These included Canadian credit report bundles, a small banking turn-key marketing solution, and banking stress test applications

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**ISO 9002/2000**

I received training in 1997, eventually leading to senior ISO internal lead auditor position, reviewing programs for compliance to the international ISO 2002 standard. My approach to audits and completed summaries were well received by those being audited as well as by our internal ISO director. Several of my audits had been used for training purposes. The company's ISO requirements changed in 2001 and the internal team was disbanded.

**COPC**

In early May of 2001 I completed an intensive 32-hour training course on international COPC call center operational standards. While ISO deals with compliance to documented policies and procedures, COPC looks into the effectiveness of quantifiable results compared to industry standards for such metrics as pattern calling, staffing levels, phone service levels, account resolution efficiency, email/FAX responsiveness, etc. through sampling and historical patterns. Sutherland decided not to roll out COPC standards within the company shortly thereafter and the program was abolished.

**Career Advancement Program**

CAP graduate in May, 2009. Participant in numerous rep-level and management training courses over my Sutherland tenure.