

ADENA WHITMAN

Austin, Texas, US ✉ Adena.Whitman4314@proton.me ☎ 205-887-1446 🌐 LinkedIn.com/in/AdenaWhitman

SUMMARY

Results-driven Business Strategist with 18 years of experience in developing and executing strategic initiatives for clients across diverse industries. Proven track record of driving business growth, optimizing operations, and maximizing profitability. Skilled in market analysis, competitive intelligence, and strategic planning. Adept at building strong client relationships and providing innovative solutions to complex business challenges. Seeking to leverage expertise to drive organizational success and deliver exceptional value to clients.

EXPERIENCE

Business Strategist / Consultant

WHITMAN MEDIA GROUP

October 2021 - Present,

- Identify and address management, customer service, communications, and marketing needs for small and medium for-profit and not-for-profit organizations, with a focus on economic development, business development, fundraising, donor management, community outreach and financial services. Write, edit, and design clear and concise strategic communication plans and materials (news releases, brochures, annual reports, newsletters, website design and optimization, etc.). Manage meetings and projects that impact the client experience, oversee events and schedule content delivery to address key initiatives.
- Created branding packages and annual appeal campaigns for a small non-profit. Reached 60% of goal to date.
- Coordinated a \$500,000 MacArthur Foundation grant for a hospital system, to be awarded in Feb. 2024.
- Wrote a \$50,000 NCUA technical grant for a small credit union in 2022.
- Coordinated financial education outreach activities for credit unions, which included reality fair implementations for high school students, reaching more than 1200 junior and senior students.

Branch Office Administrator

Edward Jones

June 2023 - December 2023, Port Angeles, WA

- Played an active role in the ongoing business planning process, developed strategies and goals, and acted as office manager, handling day-to-day tasks like accounts payable, business development, deposits, and administered back-office details for trading. Placed daily stock buys and trades, domestic and international wires. Performed notary duties.
- Drove external marketing activities, redesigned website, planned outreach and executed client recruiting events, wrote and scheduled social media postings, which resulted in new clients and more than \$1MM in new funds.
- Implemented Salesforce CRM and office-wide wi-fi channels for guests and employees.
- Created organizational system for outreach to customers on a recurring basis.

VP, Digital Branch Leader

FIRST FED

February 2021 - October 2022, Port Angeles, WA

- Built and managed the \$2B bank's Digital Branch strategy, including online account opening (deposits) and consumer lending (non-RE and HELOC products). Oversaw implementation of onboarding process for new customers, targeting retention. Created a new suite of products and services and revised existing loan products. Led the Customer Service Center function and team, adding performance metrics for Customer Service Center and reworked float pool structure, enabling them to serve the area branch structure more effectively. Added survey loop for immediate feedback.
- Achieved 150% of consumer lending goal for 2022 and 365% of consumer lending goal for 2021.
- Exceeded 118% of deposit goal for 2021 and 100% of 2022 deposit goal by end of Q3.
- Implemented Salesforce CRM and new account software across digital consumer accounts and Customer Service Center, which included creating and maintaining training materials and educational sessions.

President & CEO

INFIRMARY FEDERAL CREDIT UNION

February 2018 - October 2020, Mobile, AL

- Led operational processes and business development, focusing on loan and deposit growth. Reduced costs and improved performance efficiency by more than 18%. Redesigned compliance programs and trained employees on state and federal procedures.
- Increased lending portfolio over \$10M and asset size from \$19.5M to \$26.5M in 2.5 years.
- Grew 45% online banking, app registrations & transactions after implementing marketing and branding campaigns, building signage, website redesign, app redesign and social media campaigns.
- Implemented core system conversion project to expand product and service portfolios, allowing CU to add CO-OP Shared Branching Network, implement cash machines and design and implement a new suite of products and services to target lower-income members.

- Opened two satellite locations in remote clinics, providing services in remote areas, remaining open during COVID.

Director of Marketing & Outreach

GUADALUPE CREDIT UNION

September 2014 - December 2017, Santa Fe, NM

- Acted as community outreach and business development liaison and media spokesperson for the credit union across northern New Mexico. Helped grow membership by 18%, and credit union overall assets by \$35MM in three and a half years.
- Created and oversaw monthly bi-lingual multi-media campaigns for new products and services, focused on expanding presence across online and offline channels, including in-branch CCTV, radio, social media and broadcast tv.
- Ensured credit union brand consistency and boosted traffic efficiency by redesigning digital channels. Wrote and redesigned website and implemented Google analytics, added vehicle wraps and oversaw mobile app upgrade.
- Represented the credit union on several national boards supporting financial literacy and Real Solutions Program sponsored by the National Credit Union Foundation.
- Rewrote and coordinated compliance policies and procedures monthly, ensuring credit union adherence to federal regulations.
- Awarded \$2MM Community Development Financial Institution (CDFI) grant developing financial assistance services. Awarded multiple grants from the National Credit Union Foundation (NCUF) to provide Reality Fairs for 1200+ minority students. Awarded additional National Credit Union Administration (NCUA) grants to coordinate with Native American and Hispanic populations for financial education outreach and un- and underbanked products and services, resulting in multiple, ongoing tribal partnerships.
- Increased Facebook presence 75% in 2015, 25% in 2016, and expanded credit union presence onto additional social media channels and traditional media platforms.
- Awarded with America Saves Designation of Savings Excellence in 2016 & 2017 for managing social media saving campaigns and growing member savings by 18%.
- Distributing more than \$100K in educational scholarships as a member of the CU Association of New Mexico committee.

Senior Member Relations Consultant

THE LEAGUE OF SOUTHEASTERN CREDIT UNIONS

June 2005 - August 2014, Birmingham, AL

- Served as a consultant for stable of credit unions, steering processes and business strategies related to asset growth, member relations, financial education, international partnerships, governmental affairs, and charitable foundations. Developed secure toolkit of resource documents and guided members in operational processes related to losses and credit restructuring, marketing and business plans, budgeting, policy development, regulatory compliance, employee and board training, membership expansions, succession planning, and financial assistance.
- Achieved 85% affiliation rate for multiple years, building personal relationships and creating marketing campaigns to reach new clients and preserve memberships.
- Increasing revenue by more than 17% by providing warm leads to sales teams.
- Supervised financial education projects, workshops, fundraising and training across Alabama and Florida. Awarded National Credit Union Foundation grants (2010, 2012, 2013) for financial education programs.
- Lobbied with governmental affairs team, enhancing organizational advocacy and state and federal policy influence. Wrote policy papers and news releases for state and national use. Created documentation to be used in legislation against payday lenders nationally.
- Oversaw scholarship programs, grants and disaster relief for education and charitable foundations. Delivered more than \$1MM in scholarship funds and \$5MM in disaster relief funds to credit union employees and families.
- Designed marketing and advertising campaigns for credit unions and grant projects as well as low-income product suites for un- and underserved. Served on multiple national committees addressing financial education outreach and solutions and inaugurated the state Bank on Alabama enterprise and led the Marketing Committee.
- Administrated regulatory processes merging two foundations and distributed emergency funds across the South.

EDUCATION

***Bachelor of Arts - English and Magazine Journalism | The University of Alabama, Tuscaloosa, AL**

The University of Alabama • US, AL, Tuscaloosa

***Southeastern Credit Union Management School | The University of Georgia, Athens, GA**

The University of Georgia • US, GA, Athens

- Certified Credit Union Marketing Executive (CCUME) | Credit Union National Association, Madison, WI

CERTIFICATIONS

Notary and eNotary

State of Washington • 2022

- Legally able to certify documents for the state of Washington.

Credit Union Certified Marketing Executive™ (CUCME)

Credit Union National Association • 2018

- This designation shows others you are a verified professional who has successfully demonstrated knowledge of the most pertinent aspects of being a credit union marketing executive.

Credit Union Development Educator (CUDE)

Credit Union National Association • 2013

- Certified in the culture, strategy, outreach and impact of the credit union movement and its implementation day to day.

SKILLS

Technical Skills: Salesforce CRM, LoansPQ, Blend, Fiserv, Hubspot, Hootsuite, Adobe Creative Suite, Microsoft Office Suite, Quicken, Quickbooks, Bloomerang, Google Analytics, Figma, Squarespace

Soft Skills: Writing, Editing, Proofreading, Copyediting, Publishing, Brochures, Newsletters, Publications, Press Releases, Media Buying, Marketing Campaigns, Branding, Design.