

# Julian T. Ortiz

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## SENIOR GLOBAL STRATEGIST AND TRANSFORMATION EXECUTIVE

Strategic Planning • Profitable Growth • Operational and Process Excellence • Digital Transformation

Accomplished corporate strategist and business transformation leader who as corporate executive and management consultant has demonstrated excellence driving growth strategies, fixing underperforming operations, eliminating organization silos, harnessing technology, streamlining processes and developing talent to embrace and thrive amid change. Multi-cultural and bi-lingual, with progressive leadership over 28 years in mature and emerging economies across the US, Latin America and Asia. Superb visionary and leader with proven track record in the face of economic, technological and cultural disruption.

- As a corporate executive, transformed internal consulting team into a more strategic, relevant and impactful team driving more than \$300M in value across the organization
  - Doubled revenues and profitability for Accenture's North America's Operations & Process Transformation Practice in Financial Services within 18 months.
  - Delivered 15-30% Net Promoter Score increases, 30-50% Cycle Time Reductions, 20-30% Efficiencies and 50% SLA compliance improvements during operational excellence programs for clients.
  - Diversified revenue sources from print to multimedia while driving 15% efficiency gains and 200 bps EBITDA improvement for one of the largest Hispanic media companies in the US.
  - Transformed management structure and culture, restored market growth, achieved 15% efficiencies and lifted credit performance by 500 bps for leading Asian bank amid the region crisis in the late 90s.
  - Achieved \$600M+ in merger synergies at Japanese subsidiary of a global pharmaceutical company.
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## PROFESSIONAL EXPERIENCE

**CBRE**, Los Angeles, CA

**2017- 2019**

*Fortune 500, \$15 billion global leader in commercial real estate management and investment services*

### **Senior Vice President, Strategic Transformation Office**

Transformed the internal program management office into a more strategic, client-facing, advisory and results-oriented team to structure, drive and/or enable some of the company's most strategic transformational initiatives—worth more than \$350M million and related to capital investments governance, revenue growth enablement, operational excellence, change management and M&A planning and integration.

- Established a new value vision, while rotating/upgrading team by 75% within 18 months
- Attracted and retained talent from leading corporate and consulting organizations—while grooming them for executive positions within CBRE
- Reduced unit's operating budget by more than 25% while improving its value multiple to the organization from nil to 15-20 times its overall payroll
- Led several foundational initiatives to enable the company's continued path towards world-class

**ACCENTURE**, Los Angeles, CA

**2009 - 2016**

*Fortune 500, \$40 billion global technology & consulting services firm*

### **Managing Director, Financial Services - Strategy & Operations**

Built the Operations and Process Transformation (OPT) practice for NA Financial Services. Strengthened product offering, raised client C-suite engagement and sharpened team's multi-disciplinary capabilities. Led pricing and inclusion and diversity (I&D) initiatives for overall Strategy business. Selected to join NA CEO advisory council to help shape strategy, organization and culture. \$50M+ annual P&L impact and 200-300 consulting team purview.

## ACCENTURE (Contd.)

- Drove winning strategies improving customer focus and retention, and stabilizing market share and product profitability amid global economic crisis and post recovery.
- Led ideation, design and execution of operational excellence programs consistently delivering 30%-50% customer cycle reductions, 20%-30% efficiency gains and 50% improvements in compliance.
- Led initial assessment and early stage achievement of operational synergies in multi-year, global business transformation yielding more than \$300 million in annual savings for leading global insurer.
- Consistently enhanced client talent skills and morale through active team leadership, mentoring and coaching focused on innovation, digital reinvention, Lean Six Sigma and continuous improvement.

**EVOS CONSULTING**, Los Angeles, CA

**2003 – 2009**

*Boutique strategy consulting firm focused on mid-cap companies, non-profit organizations and government agencies*

### Founder and President

Launched EVOS to provide strategic advice to US mid cap companies seeking stronger profitable growth and more favorable access VC funding. Built EVOS into a one-partner, \$350-500K annual business with 20 consultants.

- Delivered step-level client performance improvements in revenue growth, customer service, operating efficiency, leadership succession and overall team development.
- Invited by Los Angeles Mayor to his *Small Business Advisory Board*, and launched citywide improvements and partnerships enabling market growth and funding for small to mid-sized businesses.
- Selected as US Department of Commerce "Advocate of the Year" in 2004 for Los Angeles area.

**EC HISPANIC MEDIA**, Los Angeles, CA

**2007 – 2008**

*Privately-held, \$20 million advertising company focused on the US Hispanic market*

### Chief Strategy Officer

Tapped by the Board to take on the CSO role and steward company's transition from print to multimedia. Reshaped the management structure; strengthened HR capabilities; and streamlined processes creating a more agile, talented and diversified company. Grew revenues at an 8% compounded annual growth during and beyond the recession.

**BOOZ ALLEN & HAMILTON**, US, Latin America and Asia

**1992 – 2003**

*\$5 billion global partnership that provided technology & consulting services to leading organizations worldwide.*

### Principal and Country Manager

Drove client value, Firm revenues and profitability and talent development over eleven years of rapid and multinational progression. Enabled the privatization of Mexican financial services sector and later strategic repositioning of banks as individual clients in the early 90s. Led development and growth of credit risk management practice across Asia in the late 90s. Tapped by Firm CEO to lead financial services practice in South Korea and later to run largest office in Southeast Asia. Annual P&L impact of \$20-30M with 50-100 consulting team responsibility.

- Drove strategy and business transformation programs for leading financial services clients in the US, Latin America and Asia--amid market volatility, industry consolidation, regulatory change and economic crisis.
  - Led pre-merger planning and prioritization of global pharmaceutical merger in Japan resulting in integration and cost synergies of more than \$600M over 3 years.
  - Stabilized Booz Allen's North Asia offices after Southeast office closures and ensuing talent loss.
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## EDUCATION

**MBA**, Emphasis in Finance and Corporate Strategy, Michigan's Ross School of Business, Ann Arbor, MI  
**Public Administration Graduate Summer Fellowship**, Harvard University, Cambridge, MA  
**B.A. Political Science – Minor: Economics**, The Catholic University of America, Washington, DC

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## CERTIFICATIONS

**AACSB Bridge Program for Industry Executives**, University of Dallas, , 2019  
**Data Science and Analytics Specialization**, Johns Hopkins University, 2017  
**Lean Six Sigma – Black Belt**, Accenture, 2012

## LANGUAGES

**English**, Fluent  
**Spanish**, Fluent  
**Portuguese**, Conversational  
**Italian**, Basic  
**French**, Basic

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## ORGANIZATIONS, HONORS AND AFFILIATIONS

**Board Member**, PLUS Me Project, 2016-17  
**Top 50 under 50 Executives**, Diversity MBA Magazine, 2012  
**Board Member**, Junior Achievement of Southern California, 2010-12  
**Board Member**, Inner Circle Foster Care Agency, 2005-06  
**Advocate of the Year**, US Department of Commerce, LA Minority Business Development Center, 2004  
**Professional Excellence Award**, Booz Allen and Hamilton, 2003  
**MBA Fellow, Consortium** for Graduate Study in Management  
**Graduate Congressional Fellow**, Congressional Hispanic Caucus Institute