

# KEVIN TRAINER

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## EDUCATION

**THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA**  
*Master of Business Administration Candidate; Finance and Real Estate*

**Philadelphia, PA**  
**2020-2022**

- Activities: Real Estate and General Management Clubs

**DUKE UNIVERSITY**  
*Bachelor of Science in Financial Economics, Minor in Classical Studies*

**Durham, NC**  
**2010-2014**

- Cumulative GPA: 3.84; Magna Cum Laude
- Activities: Corporate Finance TA, Economics Peer Tutor, SAE Fraternity Social Chair, Investment Club Analyst

## EXPERIENCE

**DELOITTE CONSULTING LLP**  
**Senior Consultant – Sales & Service Excellence**  
**Consultant – Sales & Service Excellence; Analyst – Strategy & Operations**

**Chicago, IL**  
**2017-2020**  
**2014-2015**

- Designed and executed end-to-end outsourcing strategy for the contact center organizations of a Top 10 P&C insurance carrier; work impacted ~800 FTEs nationally (~40% of the businesses) and generated ~\$20M in annual savings
  - Owned creation of the business case and scaling approach, managed stakeholders with competing priorities, and actively negotiated vendor contracts with total value of ~\$100M over three years
  - Led real estate consolidation strategy by performing financial, operational, lease, and tax analyses to select two existing contact center properties for closure and conducted market analysis to select new vendor locations
- Formed and implemented several strategies to improve the operations of a Top 10 Property & Casualty (P&C) insurance carrier's contact centers, resulting in projected savings of ~\$50M+ per year and improved sales performance
  - Re-organized the company's call routing and operating structure, launched new vendor relationships and negotiated third-party contracts, implemented new sales compensation plans, and adjusted spans of control
- Created three-year roadmap for a new COO to transform the operations of a Top 10 P&C insurer
  - Led cross-business FTE & Expense baseline analysis, ran site visits and client interviews, created technology-driven business models and workflows, and built the case for change (~\$150M+ annual savings)
- Managed a team of two analysts to launch a new blockchain technology business within a larger P&C insurance consortium; defined the business's organizational structure, target customer segments, product/service offerings, and projected financials
- Redesigned the sales territories of a Fortune 500 chemical company by using analytics to optimize the allocation of sales resources against key accounts and leveraged the use of inside sales and distributors to reduce costs and expand coverage
- Developed recommendations, financial models, and deliverables related to pricing strategy, price level, go-to-market strategy, and competitive intelligence to enable the successful launch of several early stage Deloitte software products

**GELBER GROUP**  
**Foreign Exchange Options Trader**

**Chicago, IL**  
**2016-2017**

- Traded and supported management of FX options market-making portfolio with yearly profit of ~\$5M; used quick-thinking and judgment, in a stressful environment with limited information, to complete multi-thousand-dollar transactions
- Identified price drivers and developed trade ideas that had direct PNL impact by interpreting current events, building models, and conducting research on historical data including regression, correlation, and spread analyses

**J.P. MORGAN**  
**Healthcare Investment Banking Summer Analyst**

**New York, NY**  
**2013**

- Created the pitch book for an Initial Public Offering that successfully secured J.P. Morgan's position as lead bookrunner
- Analyzed company financials, developed Discounted Cash Flow (DCF) models, and performed comparable analyses using industry multiples for the purposes of valuation

## ADDITIONAL INFORMATION

- **Deloitte Leadership Experiences:** Sales Benchmarking Study – Co-Creator; Sales Analytics Training – Creator; Deloitte Global Territory Design Point-of-View – Creator; Sales & Service Excellence Community Call – Lead; Deloitte New Hire Training – Coordinator/Instructor; Duke University Recruiting – Campus Strategy Lead / Campus Liaison
- **Volunteer Experiences:** Mentor – Minds Matter Chicago (2016 – 2019), Tutor – Emily Krzyzewski Center (2013 – 2014), American Legion Jersey Boys State Counselor (2010 – 2014)
- **Interests:** Personal Investing and Options Trading, Current Events (avid WSJ reader), Competitive Gaming (Real Time Strategy), Greco/Roman History (6 years of Latin, Classics Minor), Foodie (particularly Asian Fusion and Tapas), Golfing