

Brad M. Bortner

| Somerville, MA 02145

Summary

VP | EXECUTIVE DIRECTOR | MARKETING AND STRATEGY Leveraging Market Insights to Drive Success in Highly Competitive Markets

Senior management and consulting experience with extensive achievement in highly competitive B2B and B2C markets, focused on: technology, revenue enhancement, marketing, strategy, GTM optimization, brand, in-depth expertise in primary **market research**, and standing up new insight groups to drive market success.

- **Yale MBA, University of Toronto MA, Dickinson College BA, Honors, Phi Beta Kappa**
- *Key consultancies:* Cartesian, Forrester Research, comScore, MSI Consulting, Censydiam, Dove Associates, National Analysts
- *Line experience:* Iron Mountain, Cengage, Verizon, Forrester Research, IBM/Lexmark, Morgan Stanley
- *Key clients:* ACA Connects, Amazon, BC/BS, BOC Gases, Charter/Spectrum, Continental Cable, Coca-Cola, Colgate-Palmolive, Dell, Driscoll's Berries, EPRI, FedEx, GlaxoSmithKline, Hartford Ventures, Home Depot, IBM, Intercontinental Hotel Group, IRS, Magellan, Microsoft, Rohn Towers, Sun, Wiley

Experience

Momentum/ITSMA -- Independent Consultant

Head of Research, B2B Technology growth focused consultancy

Boston, Massachusetts
2022-

Iron Mountain

Director, Strategic Market Analytics and Insights, Corporate Strategy

Accelerated Iron Mountain's emergence as a growth company through market analytics and primary market research, driving substantial growth in secure storage, data center, and secure asset management markets.

- Grew core 10% during COVID, and refocused future growth to new digital offerings and markets

Boston, Massachusetts
2021 -2022

Cartesian

Principal, Strategy Practice, Technology, Media, and Telecommunications

Stood up primary market research capability to add the *why* to the *what* of big data analytics

- Optimized GTM of major cable company's B2B Edge Network offering with primary research
- Identified root cause of credential theft and advised helped stream providers reverse 20%+ revenue loss

Boston, Massachusetts
2020 - 2021

Cengage Learning

Executive Director, Market and Customer Market Research, Marketing and Strategy

Rebuilt and staffed high impact market research team to guide Cengage's return to growth in the competitive Digital Courseware space (Higher Ed and K-12).

- Facilitated disruption of higher education paradigm with Netflix-like *Cengage Unlimited* offering
- Delivered major brand, key driver satisfaction, customer journey, message testing, media consumption, and thought leadership research to drive growth in highly competitive market

Boston, Massachusetts
2017 - 2020

Verizon

Senior Product and Development Strategy Manager, Verizon Innovation Lab

Assessed, and facilitated new major products and GTMs leveraging Verizon network

- Developed IoT, Smart City, 5G, Robotics, Gig Economy, and AR/VR products
- Assessed new acquisition and spin-off opportunities

Waltham, Massachusetts
2015 - 2017

Forrester Research

Vice President, Market Insight, Forrester Corporate Marketing and Strategy

Led the creation and management of new Forrester function that centralized Competitive, Customer, and Market Insight Function, reporting to CMO.

- Created competitive intelligence function, focused on sales force crowd sourcing, secondary and primary research, war-gaming, M&A assessments, and quarterly sales training
- Upgraded and redesigned satisfaction tracking system, consolidating a dozen customer touch point functions into one unified platform, focused on business improvements
- Leveraged insights to help realign firm's strategy from legacy technology to customer-centric technology, resulting in firm's turnaround from contraction to growth

Cambridge, Massachusetts
2006 - 2015

Brad M. Bortner (2)

Vice President, Strategy and Customer Insight for Vendor and Business Technology CG 2010 -
Facilitated and led new product development, customer insight, strategy, and GTM optimization for LOB,
reported to Managing Director.

- Refocused lagging business data syndicated offering into a high growth business that exceeded plan by 150% in 2010
- Managed successful integration of Asian-based (Singapore, India, China) consultancy

Principal Analyst, Market Research Professionals, Tech Industry Research Group 2007 -
Created market research coverage practice that profitably grew (in less than three quarters) to one of the largest
roles at Forrester in seats and utilization.

- Established Forrester Leadership Board for Market Research that had the fastest ramp ever
- Delivered syndicated content, sold and led consulting engagements, and provided consulting and advisory, ranging in size from \$80k-\$500k

Director and Principal Consultant, Custom Research Group, Consulting 2006 -
Led custom primary research group to double profitability, increase sales to \$4 million, while reorganizing to
improve flexibility and scalability, upsized average project bookings by 100%.

- Established core training in research methodologies for internally grown team, substantially reduced fielding issues by professionalizing operations management function, refocused group on profit metrics, integrated Forrester Analysts to sharpen marketplace differentiation
- Outsourced function, resulting in higher bookings, profitability, and client satisfaction

comScore Cambridge, Massachusetts

Vice President, Cambridge office, Consulting and Research 2003 - 2005
Established and staffed Cambridge office for rapidly expanding Seattle-based research and consulting firm's
technology practice (Q²) and assisted in **merger with comScore**.

- Sold and directed *global customer attrition and satisfaction studies* for Amazon focused on retention and share of wallet
- Managed VC driven *management reorg.* for technology investment in insurance industry
- *Created Go-Market plan* for Internet technology media in religious institution market
- *Managed vertical segmentation analysis* of mid-tier computer server market

Censydiam USA, Inc. Somerville, Massachusetts; Antwerp, Belgium

Managing Director, US office of leading global motivational market research company 2002 - 2003
Directed reorganization of Censydiam USA and **prep for sale to Synovate**, including chapter F
reorganization to update articles of incorporation and relocate to MA, remediating extensive tax exposure issues
going back to 1993, and expanded US presence

- Clients included multi-national/F500 consumer and financial services companies; engagements defined psychodynamic segmentation and optimizing marketing tactics

MIS Consulting, Wellesley, MA, Director, Technology GTM Strategies and Tactics 1997-2002

Dove Associates, Boston, MA, Senior Strategy Associate, Cable, Energy, and Technology 1995-1997

National Analysts, Philadelphia, PA, Group Manager, Energy and Technology 1993-1995

IBM/Lexmark, Lexington, KY, Strategy Planner, Marketing 1989-1993

Morgan Stanley, New York, NY, Associate, Systems Development Group 1985-1987

Travel

Travel Experience: Belgium, Canada, Denmark, France, Germany, Greece, Italy, Japan,
Mexico, Spain, Turkey, and United Kingdom

Brad M. Bortner
Addendum – Publications

Select Publications and Conferences

- Industry Presentations:
 - *Is Declining Projectability a Hair on Fire Moment in Market Research?* Insights Association: Next2017
 - *Will In-Sourcing Lead to the Death of Full-Service Market Research Firms?* CASRO, 2009
 - *Great Marketing Failures, and How to Avoid Them with Motivational Market Research*, Boston ESOMAR conference, *Qualitative Ascendant*, 2003
 - *Researching Technology Products for New Markets*, Electric Utility Customer Research Conference co-sponsored by AMA/EEI/EPRI/Entergy, May 1997
- Forrester Publications:
 - *Social Media Offers Some Relief for High Quality B2B Market Research Sample*
 - *Fused Research Modes Will Save You Money*
 - *Enhance Customer Satisfaction's Impact*
 - *Do B2B Customer Satisfaction Right*
 - *A Simple B2B Segmentation to Drive Revenue*
 - *Watch Out for the Landmines of B2B Online Research*
 - *Market Researchers Struggle for Strategic Relevance*
 - *Why Customer Satisfaction Studies Fail*
 - *Why Good Segmentations Fail*
 - *Will Web 2.0 Transform Market Research*
 - *Does Declining Projectability Matter?*
 - *Professional Survey Takers: Still a Threat!*
 - *Segmentation: The Allure and the Risks*
 - *Integrating Buying Behavior into B2B Segmentations*
 - *Online Survey Tools Gain Ubiquity*
 - *Make Yourself an Indispensable Market Researcher*
 - *Finding Your Market Research Partner*
 - *Five Keys to Success with Online Panels*
 - *How to Effectively Outsource Market Research*
 - *Why comScore and Nielsen Disagree, and Marketers Moan*
 - *Online Panels: Cheap, Effective, but Buyer Beware!*
- ACA Covid-19 Impact on ISPs: acaconnects.org/covid-19/broadband-dashboard, April 2020
- The Threat of Credential Sharing and Theft: www.cartesian.com/the-threat-of-credential-sharing-and-theft, June 2020
- *Is it Hair on Fire Time in Market Research*, LinkedIn blog post, January 2017
- Introduction to *The Naked Consumer Today, Why Consumers Really Buy Things*, Censydiam NV 2002
- *Market Research: Planning and Striking an Appropriate Balance for Business Results*, EPRI guidebook TR-107684, December 1996
- *Marketing Strategies for Horizontal Axis Washers*, EPRI guidebook TR-1-7612, December 1996
- *There is No Such Thing as a Free Lunch*, Electricity Journal, Editorial, March 1995