Samantha Ortiz

Consulting Manager

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Summary

Consulting manager with 9 years in operations and transformation consulting for financial services and retail clients, the last 3 leading engagement teams. Manages scope, budgets and client relationships, mentors consultants, and leads proposal development that has added $9M in new work since 2023.

Experience

Consulting Manager
02/2023 - Present

Madison Row Partners New York, NY

Management consulting firm with 300 staff in financial services and retail.

- Manage 3-4 engagements at a time with teams of 5-8 and fees of $1M-$4M each.
- Own client relationships with COOs and CFOs, running weekly status meetings and monthly steering committees.
- Write proposals and pricing for 15 pursuits a year, with a win rate of 40%.
- Coach 8 consultants on structured analysis and client communication, with 3 promoted in 2025.

Senior Consultant
06/2020 - 01/2023

Lexington Advisory Group New York, NY

Operations and technology consulting firm.

- Led a bank's branch operations redesign across 140 locations, cutting teller transaction time 20%.
- Built Excel business cases and PowerPoint storylines for 6 transformation programs.
- Coordinated project management and risk management with 4 vendor teams during a core system migration.
- Analyzed store labor data for a retailer, freeing $5M in annual payroll for customer-facing roles.

Business Analyst
07/2017 - 05/2020

Hoboken Consulting Partners Hoboken, NJ

Process improvement consultancy for insurers.

- Mapped claims and underwriting processes for 5 insurers, documenting 60+ improvement opportunities.
- Built SQL and Excel reports tracking cycle-time gains after each rollout.
- Drafted workshop materials for 25 client sessions led by partners.

Education

Bachelor of Science
05/2017

New York University, Stern School of Business New York, NY

Finance

Skills

- Project Management
- Risk Management
- Proposal Development
- Business Cases
- Structured Analysis
- Excel
- PowerPoint
- SQL
- Client Communication
- Leadership

Certificates

Project Management Professional (PMP)
06/2021

Project Management Institute