DRIVING GROWTH, PRODUCTIVITY, & PROFITABILITY THROUGH STRATEGY, LEADERSHIP, & TEAMWORK

High energy, outcome-oriented operations executive with 20+ years of experience defining and executing game-changing business strategies. Passionate team leader known for building and retaining top-performing teams. Proficient in financial management and strategy. Adept at developing forward-looking processes and forging strategic partnerships with clients, vendors, and banks in order to scale companies. Laser-focused on operational excellence and efficiency.



SIGNATURE LEADERSHIP COMPETENCIES

Strategic Planning ■ Business Management ■ P&L Management ■ Financial Analysis ■ Accounting ■ Project Management ■ M&As Cross-Functional Team Building & Leadership ■ Training & Coaching ■ Benefit Design ■ Employee Retention & Engagement Process Implementation & Optimization ■ Performance Measurement & KPIs ■ Database Creation & Data Analysis

PROFESSIONAL EXPERTISE

Insynctive - Walnut Creek, CA

Business Development Executive

Working with service providers and third party administrators to offer Insynctive Hub to their clients, consult with development team for product integrations

MPAY / Payentry / Payentry Financial Services - Walnut Creek, CA

2019 - 2021

2022

President

After leading post-acquisition integration, provided organization and leadership to drive sales performance, product development, service delivery, and customer success with impact across the parent company and service providers.

- Pioneered a national sales support and implementation team to activate hundreds of thousands in stagnant contracts.
- Reinvigorated sales team by formulating an incentive structure and overhauling sales processes and delivery.
- Implemented a voluntary benefits enrollment program and attained 130%+ avg. product penetration with existing clients.

Key Functions – Special Projects | Departmental Management | Continuous Improvement | Regulatory Compliance | Budget Creation & Reporting | Marketing & Sales Development | 3rd Party Vendor Management | Client Onboarding | Processes & Tools

IDM Payroll & Insurance Services (Acquired by MPAY) – Walnut Creek, CA **President & CEO**

2004 - 2019

Leveraged trusted banking connections to secure a \$20M+ mission-critical ACH line of credit and launched a highly-competitive boutique payroll services company. Gradually diversified product offering to include insurance, tax, and HR services.

- Built out a robust technology infrastructure to create a highly efficient operating model with automations and self-service, requiring limited headcount.
- Built and developed a team of 10 employees maintained a 100% retention rate over 10 years.
- Held a competitive advantage to market dominators by using banking relationships to offer next-day transaction capabilities as well as providing high-touch support with widely recognized and highly regarded employee longevity.
- Weathered '08 recession through strong financial management, product diversification, and strategic client segmenting.

Key Functions – Strategic Vision | Day-to-Day Operations | Identifying Market Opportunities | P&L Management | Cash Flow | Sales Processes | Strategic Partnerships | Team Engagement | Customer Service | Technology | Business Planning | M&A | Negotiations

The Outsource Group PEO (Acquired by Trinet) – Walnut Creek, CA

1997 - 2003

Chief Financial Officer / Chief Operating Officer

Established financial controls, implemented scalable operational processes, and developed internal departments, unleashing the Startup's growth potential to become INC 500 Magazine's Fastest Growing Company in 2002.

- Integrated one of the market's first-ever online benefit enrollment programs, creating exceptional efficiency and profitability.
- Managed multiple technology transformations to give the company a competitive advantage and position as a market leader.
- Stood up a formal finance team and benefits enrollment team as the company rapidly grew from 5 to 100 employees.

Key Functions – Reporting & Controls | Business Expansion | Team Building | Process Implementation | Tool Creation | Financial Strategy | Stakeholder Engagement | Hiring & Training | Operational Metrics | Market Expansion | Risk Management

EDUCATION

Bachelor of Science, Mathematics / Applied Science | University of California, Los Angeles