Action-oriented strategic thinker with experience in many core areas of business, including software development, sales, marketing, accounting, fundraising, and investor relations.

Skills

Microsoft Office, GSuite, ActiveCampaign, Notion, Zapier, Buildium, Syndication Pro Dropbox Sign, Ruby on Rails, PHP, JavaScript, Python, Jupyter Notebook, Git, PostgreSQL, MySQL,

Strengths

Leadership: Communication, drive, empathy and accountability move organizations forward.

- As a founder and early employee of multiple companies, I have developed what I call the "comfort of ambiguity." In a changing landscape, I create, iterate, learn and coursecorrect on the strategic vision while sweating the details to ensure all team members stay on task and deliver.
- As the Managing Partner for BlueSpruce Holdings, I championed and implemented the Entrepreneurial Operating System (EOS) to keep everyone aligned and moving in the right direction. The EOS enabled the company to put on multiple events with hundreds of attendees and build a database of thousands of investors.
- As VP of services for Staunch Robots, I spent a month in Medellin, Colombia to absorb
 the company culture, develop relationships with the developers and establish a standard
 of excellence in service delivery.

Learning: Fast learner across domains with an appetite to meet goals.

- Originally a music major, I taught myself programming and become the CTO of two companies.
- I successfully managed an 83-unit apartment complex with no background in property management.
- While working as a data entry temp at PricewaterhouseCoopers, I taught myself finance and accounting and was hired as a full-time accountant.
- Able to go deep: I have 20 years' experience in SaaS product development, having written more than 500,000 lines of code (PHP, Ruby, JavaScript) and managed teams of engineers with experience ranging from entry level to expert.
- Able to go broad: I have experience in accounting, finance, sales, software development, fundraising, real estate syndication, property management and asset management.

Adaptability: Quickly and effectively adapt to new situations, challenges and environments while maintaining a positive attitude and delivering optimal results.

- I started and joined multiple early-stage startups where the product was in its earliest stages and required continual experimentation and feedback to find product-market fit.
- I took on multiple roles within a company, ranging from CTO to VP of Sales, with a relentless focus on doing whatever it takes for the company's success.

Efficiency: Constantly asking "can we do this faster, cheaper or in fewer steps?"

 At SurveyGizmo (now Alchemer), I saved the company \$50,000+ annually by re-writing the company's payment process and enabling the seamlessly transfer of customers to a lower cost payment processing system.

- Also at SurveyGizmo, I led a series of user focus groups to identify and eliminate areas
 of user confusion and frustration. Small changes led to big improvements in conversion
 rate and customer satisfaction.
- At BlueSpruce Holdings, I built a tightly integrated prospect funnel that used Zapier to link ActiveCampaign, Calendly, SurveyGizmo, SimpleTexting, web APIs and webhooks to automate the capture of necessary information to comply with SEC requirements.
- I implemented technology for the apartment complex to streamline tenant payments, lease applications, electronic leasing, security and reporting to investors. This enabled a full-time job to convert to part time. I also installed security cameras and electronic door locks, removing the need for an onsite security guard.

<u>Impact</u>

Business

- As the VP of Sales at SurveyGizmo, I increased the annual revenue from \$130,000 to \$3M in two years.
- As Chief Privacy Officer at email marketing provider MessageMedia, I pioneered an
 extremely effective PR initiative to promote privacy as critical to success in email
 marketing helping us sign major enterprise clients such as Dell Computer and Cisco
 Systems, worth over \$2 million in annual recurring revenue.
- As founder and CEO of Distributed Bits, I created the first ever email customer service platform. I sold the company for \$20M, yielding a 700% ROI to investors in three years.
- In a challenging commercial real estate market, I orchestrated a complex sale and leaseoption transaction that enabled a property sale at well over market value. This allowed LPs to exit with no loss of principal at a time when 20-30% "haircuts" were common.

Communication and Events

- I built and wrote content for ActiveCampaign's drip marketing campaign to potential investors.
- As an asset manager for a 330-unit real estate portfolio, I handled all communications to investors and prospects, including webinars, monthly email updates, financial reporting, dividend distribution and tax filings.
- I have given dozens of presentations to investors, tech entrepreneurs and real estate operators over the last 20 years (see example here).

Roles

BlueSpruce Holdings, **Managing Partner** (five years)

Content BLVD, Chief Technology Officer (two years)

Staunch Robots, Vice President of Services (two years)

Avenir Technologies, **Chief Technology Officer** (one year)

SurveyGizmo (now Alchemer), Vice President of Sales (three years)

MessageMedia, Chief Privacy Officer (three years)

Distributed Bits (acquired by MessageMedia), Founder and CEO (three years)

PricewaterhouseCoopers, **Staff Accountant** (three years)

Education

Training in Data Science from LinkedIn, Kaggle and other online platforms Sales Training from Sandler Sales Institute
BS in Music Education, Northwestern University