**Hi Lyndsey, see below our email thread and answers to your insightful questions. One thing I’d like to do initially is update my Linkedin headline since I left Quorum as of August. I shouldn’t use my Quorum title as my headline anymore. What would be appropriate as I search for a new role?**

**—————**

Thank you again for sharing your resume and outlining your career goals so clearly, quite the journey! I have reviewed your resume in detail, and I can see why the recruiters you spoke with said it looks good. It presents a strong foundation and reflects an impressive career trajectory. That said, I believe there is an opportunity to elevate it further so that it not only looks good but also positions you strategically for the type of CTO roles you are targeting.

High-Level Assessment of Current Resume

Strengths: Your resume demonstrates a clear history of senior leadership, successful exits, and scaling organizations. The quantifiable results you do include, such as revenue growth, budget ownership, and acquisition outcomes, are strong differentiators and highly relevant to the types of companies you are targeting.

Areas for Improvement: Right now the resume reads more like a detailed career chronology rather than a forward-looking executive marketing tool. It could do more to:

Refine the summary to position you directly as a scale-oriented CTO with a track record of aligning engineering with business outcomes.

Emphasize impact at the enterprise level such as influence with boards, investors, and executive peers.

Focus less on narrative detail and more on big-picture outcomes and measurable business impact.

Tailor language to growth-stage and PE-backed companies by highlighting transformation, EBITDA improvements, and readiness for successful exits.

To make your resume as strong and targeted as possible, I'll need additional details and data points from you. Here are a few key questions to guide us:

Strategic Impact and Enterprise Value

How have your decisions directly contributed to enterprise valuation, EBITDA expansion, or successful exits? Can you quantify that impact?

* **At Quorum, I developed and successfully executed a plan to move engineering operating expense from ~20% of revenue to less than 15%, thus increasing EBIDTA for the company. We accomplished this along a few dimensions:**
  + **Moved ~100 positions to lower cost centers of excellence (COEs) with a positive outcome for the business. Within 3 years, we have seen both an increase in employee engagement and an increase in overall team throughput/productivity. From an external view, we achieved a next +10% NPS score from our customers for the teams/products we moved to low cost centers. My CEO commented that this was the most successful low cost center move he has seen in his career. We accomplished this through a very transparent and aligned plan across engineering leadership. All leaders were involved in the change and aligned with the desired and planned outcomes. They “owned” the outcome and felt ownership for the plan vs. a plan that was built from above and handed down to execute.**
  + **Hired a key Cloud leader with experience in both hyperscaler hosting as well as private cloud. We reduced overall hosting costs and increased customer satisfaction in our cloud offerings over 2 years. Results were improved retention, NPS, and EBITDA. We grew hosting revenue by 10% while maintaining cloud costs and improved customer retention. Retention went to over 96% and NPS improved by over 10 points.**
  + **Led technical diligence and integration for 7 acquisitions. Those acquisitions have resulted in over 2x revenue growth and the development of a new product line that now represents the highest growth and overall ARR product line for the company at ~20% YoY ARR growth.**

Have you partnered with CEOs, CFOs, or boards to shape growth strategy, product-market fit, or M&A activity? What role did you play at that level?

* **Yes, as mentioned above, I led tech diligence for 7 acquisitions, integrated the teams and the technology leading to the highest ARR growth business for the company - our On Demand suite. This included:**
  + **Tech diligence and resulting one time investments tied to the investment thesis.**
  + **Technical debt investments that were needed around security and modernization that reduced overall acquisition cost and led to one-time project spend as part of the integration strategy.**
  + **Onboarding the teams and reducing overall headcount where there were synergies with existing engineering teams and technologies.**

What strategic pivots or transformations did you lead (services-to-product, on-prem-to-cloud, monolith-to-SaaS, etc.) and how did those impact growth and competitiveness?

* **This was done primarily through the M&A and initiatives mentioned above to launch the “On Demand” suite and the work done to onboard a strategic cloud leader that reduced overall cloud costs and improved NPS and retention.**

Investor and Board Engagement

What has been your level of engagement with private equity investors, board members, or external stakeholders? Did you present, influence, or drive technology strategy for investment or exit planning?

* **Board presentations on strategic engineering objectives and projects mentioned above. M&A tech diligence, Cloud hosting initiatives, and people/process changes to improve productivity, NPS, EBITDA over time. Both at Quorum and Bazaarvoice**

Can you provide examples of how you’ve helped de-risk scaling in the eyes of investors — for example, improving predictability, ensuring technical due diligence success, or accelerating post-acquisition integration?

* **As part of post M&A integration, there is always a set of technical integration and product improvements that need to get done to align with the investment thesis. I worked with the architecture and product team to develop a plan for these in each case. A big part of executing those plans involves “One-time” spend on integration. I developed a relationship with a great outsource technology vendor to provide contract and project specific development and delivery to meet those requirements. We worked with them on all of our M&A integration projects and they got very good grades on the results and were able to onboard and exit as needed when the one-time projects ended. We included a core team in the projects to ensure continuity of knowledge and ongoing operations. This is a better approach to hiring full-time employees that you may need to exit after 2 years.**
* **In terms of de-risking scaling - The reason we moved a portion of the engineering team to low cost was to drive up EBITDA as well as increase engineering bandwidth over time. Well, you can easily improve EBITDA by moving roles to low cost centers as you can imagine. The key is to do it in a way that increases your ability to deliver innovation to your customers over time. As part of the program to create low cost centers and transition ~100 roles to those centers, we developed and agreed upon a set of metrics that we would track to ensure the new teams were delivering quality work at a pace beyond our current teams. We augmented the industry standard DORA metrics to accomplish this and over a 1.5 year window we have seen an overall improvement in throughput, quality, NPS, and employee engagement.**

Scaling and Organizational Leadership

Beyond headcount, how did you transform engineering culture to achieve high performance? For example, retention of key talent, improved engagement, or leadership bench-building.

* **Retention went from ~80% to over 90% in my tenure. Employee engagement went from 56% to 75%. Some of the reasons:**
  + **Engineering culture - teams are led and not managed. Managers are coaches, advocates, and mentors.**
  + **Use of objective metrics and data to drive decisions - not opinions. Make those metrics visible and automated for all to see daily. The whole team should care about the metrics that define success and how they participate in those results.**
  + **Everyone should understand the vision, roadmap, and the desired customer and business impact. Importantly, what they are doing to contribute to that and what others are team are doing to contribute so they can effectively pivot and help others if need to ensure team success!**
  + **We used Culture Amp to assess engagement and the questions and platform were very useful to gauge the team’s health. We took that very seriously and read every comment. We got teams and first line managers involved and they worked with there teams on action plans to improve what wasn’t working. Compensation, Leadership, Company Vision, Collaboration, etc… With a team of 400 and over 30 scrum teams you aren’t going to have a single plan to fix all the things. We increased engagement from 55 to 75 and regrettable attrition to only 7%.**
  + **Mentored and coached leaders to ensure succession was in place. See my linkedin recommendations from a few of those leaders I’ve coached to senior roles. Also hired outside leaders in a couple of key places where we didn’t have the right talent. Ex. a global cloud operations leader; strong director of engineering in India**

What specific systems, processes, or metrics did you put in place that enabled the business to scale predictably without quality or cost spiraling?

* **As mentioned above we used the DORA framework to develop a set of “Metrics that Matter” around:**
  + **Reliability**
    - **Uptime by Product**
    - **SLA Attainment**
    - **Operational excellence - cloud/hosting costs as % of ARR**
  + **Velocity**
    - **Ex: Deployment frequency, Story flow, WI throughput, etc.**
    - **Release schedule integrity. Are we delivering what we said we will deliver?**
  + **Quality**
    - **Change failure rate (regressions introduced by changes)**
    - **Defect backlog trended over time**
    - **Maintenance SLOs**
  + **Security**
  + **Focus**
    - **Work breakdown by maintenance, tech debt, innovation / planned roadmap, etc.**

Technology as a Growth Driver

Which technology bets did you make that unlocked new revenue streams, improved gross margin, or increased customer stickiness?

* **The M&A and integration work for development of the On Demand Suite. This has proven to be a game changer in the impact of these acquisitions. Developed a real-time integration between the product lines that share key data and insights in real time via a REST api integration.**
* **Containerization and breaking up the monolith has reduced hosting costs and improved scalability for our enterprise products. Thus improving stickiness and CSAT.**
* **Added a first line cloud monitoring and alerting team to ensure all business processes were running smoothly with real-time self healing and run-books to address any issues proactively. This reduced customer issues with common failures due to performance or “bad data” and increased CSAT and reduced escalations by 50%.**

Can you point to innovation initiatives (AI, SaaS transitions, platform redesigns) that shifted market position or opened doors to new segments?

* **Yes, the Upstream On Demand Suite mentioned several times above was a game changer. It is a true SaaS offering that spans the entire Upstream Oil and Gas industry and a first of its kind in the industry. This allows small to mid sized energy producers to have one place to go to get an integrated suite of products for most of their operational needs vs. going to many disparate vendors.**
* **Introduced an AI focused team into the “CTO Office” that focused on AI enablement and use across engineering. We developed AI usage guidelines and best practices as well as policies. Overall productivity improved via AI use in the SDLC. We delivered our first AI features into production in early 2024 with good reviews and results. The AI focused team has built reusable AI services for the whole org across the portfolio centered around the Microsoft AI Platform.**

Signature Leadership Achievements

Across your career, what are the top 3 enterprise-level wins that best define your impact as a technology executive? These should be boardroom-worthy highlights that you would want a recruiter or investor to repeat back to you in a pitch.

* **Led engineering teams for companies with successful IPOs for Pervasive Software and Convio. Quality, Scale, and CSAT improved.**
* **Led the platform engineering team at Bazaarvoice to a successful PE acquisition.**
* **Transformed Quorum from a services led to a market/product led organization. Increased revenue from 180M to 420M. Focused the team on a culture of innovation - introducing the first annual Hackathon in 2019, which is internally considered the best event of the year with wide participation across all organizations and has resulted in several client facing features. Went to a rule of 50 and a successful PE acquisition. Scaled engineering from 160 to 400 while moving from 20% revenue to 15%.**