

EDUCATION

**M.B.A. and Master of
International Affairs**

Columbia University
New York, NY

B.S. International Affairs

**Georgetown University,
School of Foreign Service**
Washington, DC

Entrepreneurial Marketing & Operations Leader

Sales and marketing strategist. Startup, turnaround and growth specialist.

Develop and oversee B2B marketing strategies, integrated demand generation programs, and complex go-to-market plans that grow companies. Expertise in digital marketing, metrics and analysis, and scaling sales processes for growth for SaaS, data and analytics companies.

Startup, corporate, Wall Street, Silicon Valley and turnaround success with funding, growth, acquisition, and IPOs. Advise Boards and key investors, pitch to institutional investors and VCs.

Strong leader and straight shooter with a knack for building and connecting global teams. Strategic presenter able to connect dots, map out solutions, and represent the company.

Sales Process Design

Global Leadership

Demand Generation

Public Relations

Marketing Infrastructure

Fundraising

IPO Management

Revamped marketing and sales enablement, shortening sales cycle 30%, increasing close rate 80%

Turned a global team with a 30% approval rating into a respected operation with an 80% rating

Transformed \$300K investment for thought leadership conference into a \$16M sales pipeline

Turned distressed fintech company around, increasing PR 400% and stock from \$12 to \$56

Designed the first-ever B2B marketing operations and technology infrastructure for Visa

Developed business plan and go-to-market strategy to raise \$4M Series A for SaaS startup

Built Lehman Brothers' first Financial Technology franchise and lead-managed \$112M IPO

PROFESSIONAL EXPERIENCE

Founder and Principal | Growth Hacks | San Francisco, CA | 2015 - Present

Growth Hacks consults with growth companies on marketing strategies, setting up operations, sales strategy and raising capital.

Work with startups at a CFO/COO/CMO level on business plans, go-to-market strategies, KPIs and financial capital raising.

- **Startup Operations and Funding** | For a vertical SaaS startup, took a working product that was already live with 200 customers and reverse-engineered a business plan, operations, KPIs, financial projections, marketing strategy, and investor relations. Created pitch decks and presented to VCs, successfully raising \$4M Series A.
- **Fundraising Strategy and Executive Coaching** | Build financial models and pitch decks, advise on venture capital strategy, and coach and prepare executives. Help technical founders polish their presentations and messaging for the fundraising process.

CMO / VP Marketing | ClearCare Online | San Francisco, CA | 2013 - 2014

ClearCare's SaaS solution helps home care agencies match caregivers with clients and manage schedules and billing.

Established the company's first marketing efforts and refined demand generation, lead nurturing, and sales processes, as company pursued and won \$11M Series B investment from Bessemer.

- **Thought Leadership** | Positioned the company as a thought leader via an exclusive VIP conference. Invited top executives of industry leaders, organized discussions, and hosted high-end excursions. Turned an event investment of \$0.3M into \$6M closed sales and \$10M in pipeline, more than 19x ROI.
- **Sales Processes and Playbooks** | Created B2B diagnostic sales playbooks, outlining questions to assess needs of different types of clients to support tailored proposals and solutions. Developed consistent, repeatable sales outcomes and a scalable sales process.
- **Marketing Technology Operations** | Set up marketing automation, digital analytics, and integrated metrics tools. Designed an automated lead generation, scoring, and nurturing process feeding vetted leads to sales team.

B2B Innovations Marketing, Senior Business Leader | Visa | Foster City, CA | 2012 - 2013

Global payments leader Visa was launching a digital wallet to compete with PayPal, Apple Pay and Google Wallet.

Relocated by Visa to lead B2B marketing for new digital wallet, V.me, to online retailers. Managed team including multiple outside advertising /creative agencies for events, technology infrastructure, and channel marketing to retailers, partners, and resellers.

- **Marketing Strategy** | Outlined the customer decision journey using independent audience intelligence research to identify decision makers and how they make purchasing decisions. Created market segmentation and positioning.

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- **Marketing Technology** | In a company with no marketing technology platform, designed Visa's first-ever B2B marketing operations infrastructure including website content management system, analytics, marketing automation, and integration with CRM.
- **Demand Generation Campaign** | Built creative integrated demand generation campaign targeted to merchants, used at events, tradeshows, and in advertising. After a CEO change, the product was postponed and later launched as a simpler version.

CMO / Managing Director, Marketing | Capital IQ | New York, NY | 2010 - 2012

Now part of S&P Global, Capital IQ was a fast-growing 5,000-person SaaS company providing data and analytics to financial professionals globally.

Brought best practices and built a marketing strategy and team in a high-growth phase, staying through 2012 acquisition integration with S&P. Oversaw global PR, branding, tradeshows and events, digital and conventional marketing channels, and sales enablement.

- **Brand and Competitive Analysis** | Developed a brand umbrella and hierarchy of four acquired company brands, and commissioned customer research to outline our competitive advantage, resulting in a new tagline, "Right. Now."
- **Revitalized 25-person Global Marketing Team** | Converted a 30% satisfaction level with the marketing team into an 80% rating in six months by setting team goals and targets and mentoring one-on-one.
- **Sales Enablement Tools** | Consolidated 125 pieces of random collateral and web pages into solution-specific materials.
- **Sales Training** | Instituted diagnostic selling lead generation and sales techniques, rolled out new sales training and tradeshow processes to all US sales teams, shortened sales cycle by 50% and increased close rates by 80%.

CMO / Managing Director, Marketing, PR, and IR | ITG | New York, NY | 2004 - 2010

Investment Technology Group is a publicly-traded financial technology pioneer of stock trading algorithms, portfolio analytics, and execution software.

Brought in to help turn around the 15-year-old distressed fintech company, working with the founding CEO who came out of retirement. Became key member of executive team that turned a \$400M market cap into \$2.2B, with stock rising from \$12 to \$56 in the first two years. Oversaw all branding, advertising, events, PR and communications, and investor relations.

- **Built Cross-Functional Global Team** | Rebuilt the marketing team to 14 people including VP of Investor Relations, VP of Public Relations, VP of Product Marketing, VP of Branding, and Head of European and Asian Marketing.
- **Reorganized Product Lines and Launched New Brand Identity** | Consolidated 45 disparate branded offerings into customer-centric bundled suites under flagship POSIT umbrella, increasing revenues 35%. Created and launched new branding and messaging to differentiate us from big-bank competitors and establish a niche for our client base.
- **Invigorated Investor Relations and Public Relations** | Served as primary contact for Wall Street analysts and major shareholders, and created earnings reports and calls and SEC 10K Management's Discussion reports. Increased analyst coverage from 3 to 9. Led investor relations for \$270M acquisition of MacGregor, the company's largest M&A deal. Grew PR coverage 400% in two years, including Barron's cover story.

VP, Investor Relations and Business Development | eSpeed | New York, NY | 2003 - 2004

eSpeed was the publicly traded electronic trading software subsidiary of Cantor Fitzgerald, reaching \$170M revenue before NASDAQ acquisition.

Worked closely with unstoppable eSpeed/Cantor Fitzgerald CEO Howard Lutnick to rebuild investor confidence and outreach after business shutdown following the 9/11 loss of 658 employees at the World Trade Center. Took on all contact with analysts and investors, revamped company messaging, and led roadshows with the CEO to relaunch the stock and pitch to potential investors.

VP, Equity Research, Financial Technology | Lehman Brothers | NY, NY | 1999 - 2003

Lehman Brothers was an investment bank with the #1-ranked equity research department on Wall Street. Closed in 2008.

Recruited out of business school as Equity Research Analyst and became one of the fastest-promoted analysts in the company. Built the Financial Technology franchise from scratch, creating the "Trading Places" report on the future of electronic trading; *Traders Magazine* and *Security Industry News* featured the report, the head of the NYSE brought me in to consult with their management, team, and I presented at industry conferences. Lead-managed \$112M IPO for H Power, initiating calls to 200 potential investors.

LITTLE KNOWN FACTS

Instructor, San Quentin State Prison The Last Mile teaches prisoners to code; I collaborated with an inmate to design curriculum and lead a six-part series on communication, teamwork, and professionalism.

Volunteer Planned \$100K fundraiser and personally sold \$5K in chips at Hedge Funds Care / Help for Children Poker Tournament.

Board Member Norcal Columbia Alumni Association. Visual and Performing Arts Advisory Board, Burlingame School District.

Passions Nine Inch Nails. World traveler including Antarctica, Bhutan, and solo backpacking around the world.

Trophies High Handicap Game, Security Traders Association Bowling League.