
President / CEO

Professional Services and Consulting

Strategic and innovative business leader who takes an existing organization and transforms it into a global brand leader. Creates a vision, hires strategically, positions people for their strengths, and builds motivated and entrepreneurial teams. Instills passion on how to sell value, leveraging early career success in sales.

Builds long-term strategic alliances with direct and channel partners. Creates ongoing process improvements, effective training programs, and initiatives that develop loyal customers. Metrics driven, manages expectations, and breaks down silos for clear communication. Genuinely cares about people and the community.

Career Snapshot | Executive, Operations, Sales Management

- **Transformed business model** from transaction, telesales to relationship-based sales.
- **Increased revenue** from \$1 million to almost \$15 million during tenure.
- **Improved EBITDA** from \$2 million in 2000 to \$4.8 million in 2011.
- **Financed 100% of growth** from current earnings.
- **Expanded offerings** from one legacy product into four specialized service offerings.
- **Grew client base** from fewer than 100 to several thousand, including many of the nation's most prominent CPA firms, associations, and Fortune 500 companies.
- **Created healthy corporate culture** that attracted and retained productive staff.
- **Employees created "Confidential Appreciation Day"** for seven years.

Confidential, 1988 – 2011

Confidential description, tax professional services.

President, Tax Professional Services Division, 2001 – 2011

Vice President, Tax Professional Services Division, 1999 – 2001

Developed company's strategic direction to reposition from a boutique service bureau to one of the leading providers of specialized tax services in North America. Service portfolio includes software development and distribution, sales, service, support, and consulting.

Created positive corporate culture with loyal, motivated and productive staff, making it easy to hire and retain top performers. Provided training to ensure rapid on-boarding, particularly for sales associates. Fostered atmosphere of trust where each person was valued, encouraged, provided freedom, empowered, and held accountable.

Selected Highlights:

- Established strategic relationship with *Confidential* to become their preferred provider of *confidential* accounting services nationwide.
- Implemented Salesforce CRM, including significant customization to integrate ROI reporting for sales and marketing initiatives.
- Drove new sales through 50 YouTube videos, and a suite of other social media tools.
- Researched options, established and maintained presence in India through a service provider.

Tools for Transition Sample Resume

Sales Manager / Senior Consultant, 1993 – 1998
Assistant Sales Manager / Regional Manager, 1992 – 1993
Regional Manager, 1988 – 1991

Key contributor to company sales, profitability and client base growth from \$1 million sales (-10% net loss) and 400 business clients in 1988 to \$3.6 million in sales (+40% net profit) and 2,000+ business clients in 1998.

- Recognition: Top Salesperson (11 years); Employee of the Year (1989); numerous Employee of the Month.

Managed extended sales cycles with key decision makers including CFO's, Controllers, VP's of Finance, and IMS managers at independent, regional businesses to Fortune 500 and Big Four accounting firms. Identified effective sales leadership, trained, and developed incentive plans for new business and cross-sales to existing clients.

Designed marketing strategies and supported new product development. Oversaw market research, public relations campaigns, and special events. Utilized marketing firms, focus groups, national publication advertising, direct mail, trade shows, and telephone surveys.

Selected clients: Built long-term business relationships with Fortune 500 and mid-size firms in a variety of industries including manufacturing, chemicals, grocery, automotive dealerships, and their CPA firms.

- Personally generated \$1.3 million (35% of company sales). Managed 400+ clients with 97% retention.
- Involved in pricing and contract negotiations for software sales, licensing, and product rollouts, and upgrades.
- Played key role in 1992 transition from service bureau to software development, sales, service and consulting.
- Assisted in development, pricing, launch, and marketing of four software products.
- Developed sales team, including territory design and compensation plans.

Education

Confidential University, Texas
Bachelor of Business Administration

