Matthew Carpenter

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Ph.D.(c) Research in Technology Management and
Digital Communication Systems

Indiana State University

Master of Science, Engineering Management

The University of Kansas

Bachelor of Science, Management and Computer
Information Systems

Park University

Oracle Cloud Infrastructure Architect (OCI)
Cisco Certified Network Associate (CCNA)
AWS Technical Professional
AWS Business Professional
Microsoft Certified Professional (MCP)
CompTIA A+
Six Sigma Yellow Belt

Certifications

American Heart Association 2021 - 2025, Heart Ball
Official Sponsor and Ambassador
Competitive Baseball Coach (10+ years)
FinTech & MSP Consultant for Non-Profit Organizations
Mentoring Early Professionals (LinkedIn)
Leadership Consultant and Executive Coach
Elegant Elephant Co - Fine Woodworking for Non-Profit
Auctions

Service / Community Outreach

Top 9 Books Read in 2024-2025

- ✓ "Grit" by Angela Duckworth
- ✓ "The Energy Bus" by Jon Gordon
- ✓ "Good to Great" by Jim Collins
- ✓ "Atomic Habits" by James Clear
- ✓ "Thinking Fast and Slow" by Daniel Kahneman
- ✓ "Drive" by Daniel Pink
- ✓ "Hidden Potential" by Adam Grant
- ✓ "How to Win Friends and Influence People" by Dale Carnegie
- ✓ "Mastery" by Robert Greene

May '25

Attn: Leaders,

Thorough due diligence is critical for private firms to accurately assess the potential of any acquisition, or equally, any internal division - especially Sales. My graduate education, certifications, and 25+ year career filled with numerous awards has uniquely positioned me to provide rapid and comprehensive evaluations of high-tech, service, and MSP sales organizations, the health of customer accounts, client portfolios, and the overall viability of future revenue streams.

My expertise is particularly valuable in the context of mergers, partnerships, and acquisitions, where I've consistently and successfully demonstrated my ability to:

- Rapidly assess and optimize sales, pre-sales, post-sales, implementation, service, and operational teams in concert with revenue streams, both new and existing
- Skilled in identifying critical gaps in processes, documenting solutions, CRM systems, and talent evaluation that impacts revenue generation and customer retention
- Normalize systems and processes to create a scalable and efficient operating model, ensuring both smooth continuity while accelerating revenue growth

My work experience spans numerous MSP mergers, acquisitions, and partnerships, including:

- Sprint buys Sprint PCS (1998-1999), WorldCom's failed purchase of Sprint (1999)
- AT&T buys Callisma MSP Consulting (2004), SBC and AT&T (2005), Cingular and AT&T Wireless (2006), AT&T acquires Bell South (2006), AT&T buys USi MSP (2006)
- PE Firm Accel-KKR owned MSP Layered Technologies acquired by Datapipe (2014)
- Oracle and 30+ acquisitions (2015-2022), DataFox (AI driven data enrichment 2018)
- Spot.io and NetApp (2020), NetApp and CloudCheckr (MSP and multi-cloud optimization) (2021)
  - o Personally built out and scaled Spot sales, training, and revenue globally from $30M to $100M in managed services revenue in 7 months
- Avid and True Owl MSP services (2021), Allo Business and Avid Communications (2022), and Allo and Precision IT MSP (2024)
  - o Built an MSP sales and training program, content, scaled nationwide

In the context of due diligence, the aforementioned experience allows me to provide:

A Rapid Sales Organization Evaluation: A rapid assessment of the sales team's effectiveness, including performance metrics, sales processes, time investment allocation, and talent evaluation.

Customer and Contract Diligence: A detailed analysis of customer accounts and contract portfolios, identifying potential risks and opportunities. I can quickly and accurately evaluate the value of the current book of business and predict/forecast future revenue(s).

Future Revenue Viability Assessment: A comprehensive evaluation of the target company's future revenue streams, considering market trends, competitive landscape, and customer retention.

Process Optimization & System Normalization: I have extensive experience developing new processes, and normalizing systems between two firms to create a unified, more efficient, operating model. This normalization is vital for acquisition continuity and maximizing synergy.

Data-Driven Insights: I am highly proficient in building complex financial operational models within Excel and PowerBI, utilizing pivot tables, slicers, and advanced data modeling techniques.

I am confident that my expertise and niche skillset will provide your firm with a significant competitive advantage in evaluating potential acquisitions and maximizing portfolio value.

Sincerely,

Matthew Carpenter