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Critical Thinker – Strategy & Culture Builder – Customer Success Champion – Thought Leader

Results-driven Sales Leader with extensive experience in leading and transforming sales organizations within the dynamic communications, high-tech, streaming, utilities, and technology industries. Possessing a strong foundation in strategic sales planning, I excel at building and leading high-performing international teams, including remote and distributed workforces. Proven ability to hire and develop top-tier first and second-line sales managers, design impactful training programs, and drive consistent revenue growth through effective sales strategies. Adept at problem-solving, budget and P&L adherence, and utilizing advanced sales software for territory optimization. My leadership is characterized by critical and strategic thinking, enabling me to consistently exceed sales objectives and deliver documented success.

Core Competencies + Top Five Books

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|---------------------------|-------------------------------|---|
| ✓ Strategic Planning | ✓ Sales Forecasting | ✓ "Grit" by Angela Duckworth |
| ✓ Critical Thinking | ✓ Professional Development | ✓ "The Energy Bus" by Jon Gordon |
| ✓ Customer Lifetime Value | ✓ Financial Analysis/Modeling | ✓ "Good to Great" by Jim Collins |
| | | ✓ "Atomic Habits" by James Clear |
| | | ✓ "Thinking Fast and Slow" by Daniel Kahneman |

Career Highlights

- Co-Founded and led an eCommerce, consulting and web hosting company in the late mid/late 90's, Part of two startup firms, one of which was acquired by NetApp and the other by Rackspace
- Built a diverse Customer Success Organization from 20 to 50, consisting of 5 leaders on 4 Continents for Spot by NetApp, **growing the revenue from \$30M to \$100M in 7 months**, with **85%** of that growth coming from net-new revenue, originating from my organization – improving NPS, CSAT, while reducing Customer Churn
- Led a Global growth effort, building out the international team to Singapore, India, Israel, and Brazil – through experience with three Start-Up's, and 5 Fortune 500 Firms.
- Recruited, developed, and launched a new and successful division supporting Oracle's top Global ERP clients with a SaaS target in excess of \$700M Annually
- Two consecutive fiscal years with zero losses to competition, while building an international team from scratch including 99+% accuracy in budgeting, forecasting and territory alignment.
- In my initial fiscal year with Oracle, I was the sole employee in my organization to be inducted into the prestigious Club Excellence for FY'16 (Top 3% of the Entire Sales Force, Top 2% of the Cloud Renewal Sales Division) and earned the elite status of FY'16 NAA Customer Success MVP (Top 0.1% of the Organization)
- Developed a complex financial model for a 10,000+ license CRM contract for Emerson Electric across 10 different Business Units; successfully negotiating with each BU Executive completing a \$9M+ contract with price uplift and simultaneous signing and linking language – additionally recovering \$1M in revenue recovery for Oracle
- Designed, negotiated and implemented the Focal Communications telecommunications infrastructure prior to the company's successful IPO in 1999 (Ticker: FCOM)
- Designed a nationwide fiber network to multi-tenant buildings, a precursor to the successful launch of the Cypress Communications IPO in 2000 (Ticker: CYCO)
- Lead designer and contract negotiator successfully winning and implementing the exclusive American Idol and Dancing with the Stars text paging network infrastructure from inception; including the VeriSign (VRSN) DDoS Network Infrastructure with AT&T
- March '07 AT&T Hall of Fame Inductee, Top 1% of Global AT&T Sales and Engineering Force

- Multi-Million Dollar Revenue Generation & Data-Driven Sales Strategy: Drove a successful scalable Managed Services revenue growth strategy through strategic lead generation, BDR team development, and inbound/outbound dialer strategies, leveraging expert forecasting and metrics to optimize sales performance.

2021 - Present

Industry Expert - Consultant

Kansas City, MO

Guidepoint and CleverX, plus Non-Profit Engagements

- Executive-Level Strategic Advisory & Thought Leadership: Delivered strategic advisory and thought leadership services through Guidepoint Consulting and CleverX Consulting, providing expert insights to C-suite executives on leadership development, customer success organization transformation, churn reduction, revenue acceleration, technology integration, and cloud infrastructure optimization.
- Proprietary Methodologies & Organizational Transformation: Engineered and deployed proprietary methodologies, including Discretionary Effort Modeling, Product/Sales/Customer Success Ecosystem Triangle, and Customer Journey Mapping, to drive comprehensive organizational transformation and optimize post-sales support, resulting in significant gains in operational efficiency and customer satisfaction.
- Revenue Optimization & Customer Lifetime Value Enhancement: Provided strategic counsel on developing and executing advanced upsell/cross-selling strategies, objection handling methodologies, and comprehensive research frameworks, driving substantial improvements in Customer Lifetime Value and sustainable revenue growth.
- Strategic Business Consulting & Data-Driven Transformation: Delivered strategic business consulting on data center migrations, data-driven decision-making, and anonymous employee feedback engagement surveys, leveraging expert PhD-level research skills and a commitment to business ethics to guide clients through complex transformations.

2021 – 2022

Spot by NetApp

Kansas City, MO

Director, Global Head of Account Management and Customer Success Engineering

- Global Sales Leadership & Market Expansion: Led a high-performing global sales organization, directing 5 regional sales leaders and their teams across 4 continents, driving strategic market penetration in both the Americas and international markets.
- Talent Acquisition & Leadership Development: Engineered rapid sales leadership team expansion, recruiting and developing 50% of the leadership team to accelerate revenue growth, demonstrating a commitment to building a high-performing global sales force.
- Revenue Transformation & Strategic Growth: Orchestrated a significant revenue transformation, driving a 233% increase from \$30M to \$100M within 7 months through strategic sales initiatives, effective team leadership, and rigorous performance management.
- Operational Excellence & Customer Lifecycle Optimization: Designed and implemented streamlined sales processes and cross-functional engagement standards across pre-sales, post-sales, and renewals, optimizing the customer lifecycle and enhancing overall customer satisfaction.
- International Market Entry & Business Development: Spearheaded international market expansion, conducting comprehensive market research and developing business cases for entry into Brazil and Singapore, resulting in the establishment of new sales teams and customer success organizations.
- Comprehensive Customer Lifecycle Management & Technical Expertise: Oversaw the entire customer lifecycle, driving revenue generation from onboarding and ramp-up to complex implementation (containerization, K8S optimization, FinOps/DevOps) and ongoing customer success, ensuring sustained client value and technical excellence.

2018 – 2021

Oracle

Kansas City, MO

Director – Business Value Leadership Team (Key Accounts), Sr. Manager – Presales Solution Engineering, Industry Verticals – Customer Experience and Value Services

- Strategic Leadership & Vertical Expertise: Directed and mentored a high-performing Presales Solution Engineering team, providing strategic leadership and specialized expertise in SaaS applications across key 'Upmarket' verticals: Communications, Media, Entertainment, Financial Services, and Insurance.
- Innovative Solution Design & Client-Centric Approach: Pioneered innovative, tailored live demonstration strategies, shifting from generalized presentations to focused B2B, B2C, and Mobile application solutions, directly addressing and resolving immediate client pain points, thereby driving accelerated sales cycles.
- Executive Alignment & Strategic Opportunity Identification: Cultivated executive alignment by translating Oracle solutions into strategic opportunities derived from detailed analysis of clients' Annual Reports, demonstrating a deep understanding of their business objectives and fostering strong C-level relationships.
- Customer Experience Transformation & Digital Strategy: Provided expert guidance on modernizing and transforming Customer Experience and communications platforms, both on-premise and cloud-based, with a focus on Digital Communications and seamless integration, guiding clients through complex digital transformation initiatives.
- Proactive Solution Anticipation & Strategic Foresight: Demonstrated strategic foresight by anticipating client needs and delivering forward-thinking solutions, positioning Oracle as a trusted advisor and driving long-term client partnerships.
- Cross-Functional Leadership & Complex Project Management: Orchestrated complex, cross-functional projects, bridging the gap between solution architecture, Product Marketing, Sales Leadership, Product Strategy, Demo Services, and all Oracle Global Business Units, ensuring seamless execution and alignment with corporate objectives.

2016 – 2018

Oracle

Overland Park, KS

Manager, ERP Cloud SaaS Renewals, Customer Success

- Strategic Territory Management & Global Financial Oversight: Architected and executed comprehensive global territory strategies, optimizing resource allocation and coverage models across international regions, overseeing a \$767M+ annual budget, and driving substantial revenue growth.
- Global Sales Leadership & Talent Development Excellence: Engineered the recruitment, development, and leadership of a high-performing international team of Cloud Renewal Sales Managers, implementing process optimization, designing strategic compensation plans, and delivering advanced sales and negotiation training, driving consistent performance excellence.
- Culture of Excellence & Executive Leadership Pipeline Development: Cultivated a culture of excellence by strategically acquiring top-tier talent and developing a robust executive leadership pipeline, significantly reducing employee churn through targeted talent development initiatives and fostering a high-retention environment.
- Exceptional Performance & Industry Recognition: Consistently exceeded performance targets, earning recognition as a FY'16 Club Excellence Inductee (Top 3% of Sales Force, Top 2% Cloud Renewal Sales) and FY'16 NAA Customer Success MVP (Top 0.1% of Organization), demonstrating a proven track record of delivering exceptional results and driving organizational success.
- Enterprise-Wide Strategic Training & Cross-Functional Alignment: Designed and deployed a strategic training program for managers and key contributors across diverse business units, fostering seamless collaboration and driving enterprise-wide strategic alignment.
- Global ERP Product Portfolio Expansion & Specialized Team Development: Spearheaded the rapid expansion of Oracle's 'Upmarket' ERP product portfolio by building and leading a geographically diverse US and International team of Oracle Financial Cloud Renewal Experts, driving significant market penetration.
- Operational Efficiency & Data-Driven Automation: Developed and implemented a sophisticated automation tool within MS Excel, driving increased accountability, reducing

operational errors, and delivering a significant positive impact on Oracle's bottom-line revenue through data-driven operational improvements.

2015 – 2016

Oracle

Overland Park, KS

Sr. Manager – CX CRMOD Cloud, Customer Success (Startup's Team)

- Exceptional Performance & Elite Recognition: Achieved elite recognition as a 2016 Oracle Club Excellence Inductee, selected among the top four individuals from a global Customer Success and Experience organization of 1900+ employees, based on outstanding performance, revenue recovery, and portfolio growth.
- Unprecedented Client Retention & Revenue Growth: Delivered unprecedented client retention, transforming a portfolio with a 30% historical retention rate, to 99%, and achieved 142% of revenue attainment for FY'16, demonstrating exceptional client management and revenue generation capabilities.
- Strategic Contract Negotiation & Revenue Uplift: Led commercial contract negotiations for Oracle's largest Sales Automation Cloud clients, focusing on securing long-term, multi-million dollar deals with significant revenue uplift, demonstrating expert negotiation and deal-making acumen.
- Complex Financial Modeling & Strategic Decision Support: Developed and presented comprehensive business cases and financial models for complex, multi-year, cross-pillar projects, providing in-depth financial analysis, modeling, and quantitative analysis to support strategic, long-term decision-making.
- Executive-Level Communication & Process Optimization: Delivered executive-level briefings to internal and external stakeholders on process improvements across product pillars for Finance, IT, and Operations, driving operational efficiencies and enhancing Oracle's Cloud product and process performance.
- High-Stakes Negotiation & Strategic Partnership Management: Provided expert analysis and strategic recommendations on high-stakes negotiations, addressing balance of trade, service, budget, and partnership triage with high-value clients, ensuring alignment and maximizing client value.
- Strategic Liaison & Long-Term Partnership Development: Served as the lead negotiator and strategic liaison between Oracle and its most valued 'Upmarket' clients, ensuring vision alignment and solidifying long-term, strategic partnerships.

2013 – 2015

Layered Technologies

Kansas City, MO

Enterprise Technical Account Manager – Commercial Markets

- Strategic Client Leadership & Executive Engagement: Recruited to provide strategic leadership for three of the top five global clients in the financial and healthcare verticals, reporting directly to the Executive Vice President of Sales and Marketing, demonstrating exceptional client management and executive-level influence.
- C-Level Relationship Management & Compliant Cloud Revenue Growth: Cultivated and maintained strong C-level relationships, driving strategic design and significant revenue growth for PCI and HIPAA compliant managed hosting solutions, demonstrating deep understanding of regulatory requirements and client needs.
- Strategic Data Center Infrastructure Design & Deployment: Engineered the strategy, design, and deployment of private, public, and hybrid data center environments, focusing on highly available (HA) infrastructure, power, and environmental optimization to meet the critical needs of enterprise-level clients.
- Business Planning & Compliant Cloud Solution Expansion: Developed and executed successful business plans for new and existing clients, driving significant growth in managed compliant cloud hosting and dedicated server environments, demonstrating a proven ability to translate client needs into actionable strategies.
- Scalable Infrastructure Strategy & C-Level Advisory: Served as a trusted advisor to C-level decision-makers, developing and implementing scalable infrastructure strategies to support eCommerce, Software as a Service (SaaS), and content distribution, ensuring alignment with business objectives and driving technological innovation.

2008 – 2013

AT&T

Kansas City, MO

Client Business Manager – Premier Client Group

- Strategic Client Management & Multi-Million Dollar Portfolio Leadership: Promoted to Client Business Manager (CBM), providing strategic leadership for premier clients headquartered in the Midwest, managing a \$40M+ annual revenue portfolio and driving significant client growth.
- Comprehensive Technology Portfolio Management & Consultative Sales: Directed the strategic direction, consultative selling, and management of AT&T's comprehensive wireline, wireless, hosting, mobile application, consulting, and managed services portfolio, delivering integrated solutions to meet complex client needs.
- On-Site Client Partnership & Cross-Functional Team Oversight: Established a deep on-site client partnership, operating on client premises four days per week, providing strategic oversight of Account Executive, Service Management, and Technical Resource teams to ensure seamless service delivery and client satisfaction.
- Advanced Technology Solutions & Strategic Contract Negotiation: Provided expert guidance on carrier-grade networks, strategic connectivity, next-generation wireline/wireless technologies, security, consulting services, mobility applications/middleware, and led strategic contract negotiations and implementations.
- Operational Excellence & Client Satisfaction Advocacy: Drove operational excellence through process improvement initiatives, conducted regular client meetings to ensure satisfaction, and led project management teams through the entire lifecycle, consistently exceeding metrics and milestones.
- Trusted C-Level Advisor & Strategic Relationship Management: Cultivated and maintained trusted advisor relationships with C-level executives, providing strategic guidance and direction through consistent on-site presence and proactive engagement, solidifying long-term client partnerships.

2003 – 2008

AT&T / SBC DataComm

Kansas City, MO

Integrated Solutions Executive II – Signature Client Group

- Elite Sales Recognition & Industry Leadership: Inducted into the AT&T Hall of Fame in March 2007, recognizing placement within the top 1% of the total AT&T sales force, demonstrating exceptional sales performance and industry leadership.
- Strategic Client Management & Multi-Million Dollar Portfolio Oversight: Directed data, CPE, wireless, and wireline network sales, design, and support for signature clients, managing a \$15M+ annual quota and providing pre/post-sales support for 20+ sales resources, showcasing exceptional portfolio management and team leadership.
- Comprehensive Technology Solutions & Strategic Network Design: Engineered and delivered complex technology solutions, encompassing international/domestic private lines, SS7, Frame, ATM, MPLS, IP services, MIS/GMIS, Ethernet, private fiber, managed services, hosting, Ultravailable networks, ACCU-Ring, 3G/4G, LTE, Wi-Fi, 2D barcoding, cloud services, tablets, security, and mobile device management, demonstrating deep technical expertise and strategic network design capabilities.
- C-Level Strategic Partnership & International Strategy Development: Cultivated and maintained strategic partnerships with C-level executives, providing on-site presence three-plus days per week and actively participating in strategic planning meetings to develop domestic and international business strategies.
- Complex Project Management & Vendor Partnership Leadership: Led and managed complex projects involving wireline and wireless carriers, LECs, CLECs, RBOCs, equipment vendors (Ciena, Cisco Systems, Juniper Networks, Adtran), and contractors, demonstrating exceptional project management and vendor partnership leadership.
- Consistent Sales Performance & Quota Attainment Excellence: Consistently exceeded sales and quota attainment targets for 17 out of 18 months, demonstrating a proven track record of driving exceptional sales performance and delivering consistent results.

CEO and Co-Founder

- **Entrepreneurial Vision & Business Foundation Development:** Conceptualized, developed, and executed the comprehensive vision, strategy, and sales & marketing plan for a technology solutions business, building it from inception to a successful operating entity during the rapid growth and evolution of the Dot-Com era.
- **Network Infrastructure & Technical Solution Architecture:** Architected and implemented complex network installations, including LAN and WAN infrastructure, computer systems, and software solutions, specializing in network design, infrastructure build-out, and technical consulting, navigating the unique technical demands of the Dot-Com boom.
- **Custom Computer Solutions & Network Engineering:** Engineered and delivered custom computer solutions, including hardware architecture design and network setup, demonstrating a deep understanding of technical systems and client-specific requirements, catering to the burgeoning technology needs of Dot-Com businesses.
- **E-Commerce & Digital Platform Development:** Developed and deployed comprehensive e-commerce and digital platform solutions, including website design, online transaction processing, security protocols, and co-located server hosting, demonstrating expertise in digital infrastructure and online business solutions. Provided POP, FTP, Telnet, and SNMP support for clients. Managed NT based servers with Front Page extensions for web clients, supporting the rapid expansion of online commerce during the Dot-Com era.
- **Strategic C-Level Relationship Development (Dot-Com Era):** Cultivated and maintained strategic C-level relationships with emerging Dot-Com companies, providing technical guidance and strategic direction during a period of unprecedented technological innovation and market volatility, establishing long-term partnerships and navigating the challenges of rapid growth.