

Bespoke Search Group

COO / CFO

Summary

Accomplished Operations Leader with over 20 years of experience:

- Fractional COO, CFO, Head of Customer Success, and advisor in ten consulting engagements.
- Head operations and finance in six full-time roles, resulting in M&As, debt and equity raises.
- Lead collaboratively in seeking operational effectiveness and cost efficiency to align with vision.
- Handled People Operations, Recruiting, Legal, Technology, Payroll and Benefits multiple times.
- Foster growth through communication, team collaboration, metrics, & individual development.

Skills & Expertise

Strategic Analysis, Modeling, and Execution • Cross-Functional Team Efficiency and Metrics
Alignment of Company Goals, Team Initiatives, and Performance Evaluation • Executive Coaching
M&A Strategy and Integration • Business Re-Organization • Financial Management and Projection

Work Experience

Confidential New York, NY 2018 - present

Fractional COO/CFO

- Established revenue operations and people operations at an international service company.
- Installed a Client Success function, addressed their customers' needs, and improved processes.
- Working with accounting company around sales process, client engagement and retention.
- Supported law firm on business development, public engagement, and accounting practices.
- Prepared founders presenting to potential investors with understanding financial talking points.
- Helped launch security risk firm with financial strategy, business operations, and branding.

Confidential New York, NY 2015 - 2018

CFO

- **Impact:** Series B fundraise, reached profitability (EBITDA), and nearly doubled line of credit.
- Lead strategic planning, budgeting, forecasting and operations engaging Founders, investors, team.
- Installed financial operations and controls, measured health across company and reported to Board.
- Saved over \$200K in 2017 across expenses, while preserving customer quality and effective workflow.

Confidential New York, NY 2012 - 2015

VP Finance and Operations

- **Impact:** Successful acquisition by bringing relevant investors for discussion, preparing financial models, handling due diligence reporting and responding to various business, fiscal and legal teams.
- Replaced CFO (co-founder); presented to Board and CEO, installed fiscal structure, controls, process.
- Built financial, recruiting, and sales processes; created budgets with teams and held expenses.

Confidential New York, NY 2012 - 2015

Vice President of Finance

- **Impact:** Facilitated merger after establishing finance and operations as revenues grew 50% annually.
- Established performance and financial controls; completed due diligence requirements.
- Installed accounting, banking and payroll processes; directed systems and handled government compliance.

Confidential New York, NY 2008 - 2011

Co-Founder

- **Impact:** Launched company, sold into international firms, and built partnerships (e.g. American Airlines).
- Opened four offices, established an accounting system, business processes (e.g. CMS), and budgets.
- Created and reported financial and business projections to potential partners and investors. Acquired 2014.

Confidential New York, NY 2004 - 2008

Director of Finance

- **Impact:** Set incentive plan to offset huge client; next year revenues exceeded prior year despite loss.
- Prepared financial statements, forecasts, and led discussions on utilization and plan vs. actual analysis.
- Reduced non-labor costs by 15% in the first year and increased utilization by 10% in the second year.

Confidential New York, NY 2002 - 2004

Founder

- **Impact:** Designed cause-related marketing programs which generate revenues and non-profit funding.
- Built financial and marketing plans; presented to professionals and potential investors.
- Helped companies reach new demographics, train employees while non-profits gain unrestricted funding.

Confidential New York, NY 1999 - 2002

Director of Operations

- **Impact:** Organized operations, handled client relations, and built quality control prior to acquisition.
- Supervised five managers and 24 staff at three sites in payment processing team and administration.
- Led processing division with 2.5M monthly transactions: automated complex procedures, established new quality control to proactively identify numerous errors, reached out to banks and improved process.
- Installed offices in seven states including budgets, financial policy and procedures, insurance, and payroll.
- Managed three Fortune 500 clients (e.g. Citigroup) considered troubled; facilitated renewals within a year.

Associations

Advisor for Almaworks Startup Lab at Columbia University, Advisor for TechLaunch business accelerator program, Advisor for The Tamer Center for Social Enterprise at Columbia Business School

Education

Columbia University, New York, NY

Master of Science in Social Administration (Business minor)

Duke University, Durham, NC

Bachelor of Science in Psychology (Graduated with Distinction)