

Bespoke Search Group

Chief Operating Officer & Chief Financial Officer

Highly effective Global Business Operations and Financial Executive with over 20 years of experience. Offering an array of skills in strategic vision implementation, business / financial acumen, talent acquisition and empowerment, leadership, performance analysis, problem solving and software management. Ability to multi-task in high-stress, dynamic environments while driving growth. Unique combination and ability to play the role of builder, fixer and optimizer dependent upon business requirements

SUMMARY OF QUALIFICATIONS

• Global Operations	• Personnel Development	• Leadership Development
• Strategic Planning & Execution	• Business Process Reengineering	• Performance Management
• Scaling Experience	• Cost Savings & Reduction	• Margin Improvement
• Leadership Development	• Change Management	• Public Offerings

MY CAREER AS A LEADER

Leadership Style:

Results oriented with a strong fundamental belief in servant-based leadership. A keen focus on scalability through a systematic process of development of people, processes and systems. Fair and equitable tempered with a direct / performance driven approach. Strong foundations in team building, mentorship and development. A focus on building broad and diverse teams in the tech ecosystem. A natural ability to solve complex problems through applying frameworks and root cause analysis. Humble, hardworking, resourceful and resolute.

Key Results:

- *Series B Operational Achievements:* Hired 10 new leaders and scaled headcount by 4x within the first 11 months of joining. 4x revenue growth over the past 24 months. Built out marketing, talent, people operations, business operations and finance departments from the ground up. X named X on Inc. 5000 list.
- *Series B Financial Achievements:* Inherited a financial team that had not closed the books in several months and hadn't reconciled cash in over a year; quickly created monthly reporting and completed historical financial remediation. Implemented the first annual operating plan process, quarterly forecast process and goal setting process (OKRs). Raised round of capital at 2x prior valuation and secured significant LOC.
- *Series D Operational Achievements:* 2x increase in headcount. Scaled South Africa office from 5 to 150+ in 3 years. Built from the ground up the following departments: finance and accounting, business operations, technical support, customer success and talent acquisition. Re-engineered the following functions: professional services and product engineering. Implemented performance optimization programs.
- *Series D Financial Improvement:* 4x increase in Revenue, 15x increase in Gross Margin %, 30% increase in retention and achieved cash flow generation and profitability in 2018 after 16 years of losses.
- Successfully lead 11 cross functional workstreams to bring Converse Network Solutions Inc. public through a spin out and public offering in record time all during Super Storm Sandy. Our motto then, "Making the impossible possible!"

Recognition:

- CFO Innovation Award Recipient for work as CFO / COO at Series D
- Won turn-around of the year for the middle market for change management work while working at Confidential. My first professional experience in an executive leadership capacity.
- Top Tier Rated Investment Banking Analyst while at Merrill Lynch. \$1bln + of deals completed

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RECENT EXPERIENCE

COO

Series B (*Tech Enabled B2B Marketplace*)

2022 – present New York, NY

- **Rapid Scaling:** Grew revenue and headcount by 4x
- **Ground Zero:** Built several departmental functions from the ground up (including marketing) and transitioned departments to other leaders.
- **Operational Foundation:** Implemented core foundational operational principles: annual planning process, quarterly forecasts, OKR, weekly KPIs, etc.
- **Financial Reporting:** Created robust financial reporting process. Developed financial close process and worked towards consistent improvements to further accelerate close process.
- **Financial Improvements:** Improved DSOs by 50% and accelerated financial close by 40%.
- **Streamlined Expenses:** Reduced non-operating expenses by 25% and improved cash generation by 40%.

COO & CFO

Series D (*Enterprise Content Management Systems*)

2014 – 2021 New York, NY

- **Demonstrated Results:** 4x increase in revenue, 15x increase in GM %, 30% increase in retention, generated profitability and cash flow generation for the first time in 16 years.
- **Team Builder:** Built out and scaled the following departments: finance and accounting, people operations, legal, business operations, customer success, technical support and delivery.
- **Scalability:** 2x increase in headcount. Scaled South Africa operations from 5 FTEs to 150+ in 2 years.

AVP of Financial Strategy

Publicly Traded (*Enterprise Tech / Telecom*)

2012 – 2013 New York, NY

- **IPO:** Member of team to successfully unwind complex corporate structure through spin off and public offering
- **Cross-Functional Leadership:** Lead 11 cross functional teams to coordinate efforts to spin off and the initial public offering of operating subsidiary with a focus on the financial reporting, tax and transaction work streams
- **Global Financial Leadership:** Lead global financial and planning efforts including budgeting and forecasting efforts with direct and indirect responsibility for a team of 32 employees
- **Strategic Planning:** Lead company long range planning process. Developed strategic framework and cross-trained finance directors to coordinate global planning process

EDUCATION

Master of Business Administration

Duke University

BA in Business Economics with an Emphasis in Accounting

PHILOSOPHY

Build teams that focus on making the people around them better.

MOST PROUD OF

Building Exceptional Teams

by providing people the opportunity to learn and grow. Built out multiple departments from the ground up.

Financial Visibility

provided at Series B by quickly implementing and standardizing financial reports.

Making Series D Profitable

only 4 years after starting by focusing on a comprehensive transformation strategy

Effective Change Management

implemented after loss of largest Series D customer. Account represented 25% of 2014 Revenue.

Brought CNSI Public

in 8 months during Super Storm Sandy by leading 11 cross-functional workstreams

STRENGTHS

Operations / Foundational
Finance / People Operations /
Strategy /
Data Analysis

Focused / Strong
Communicator / Direct /
Honest / Hardworking /
Persuasive / Determined

MY TIME

