
Former AI SaaS Software CEO and Management Consulting Senior Partner

I am Seeking a C-suite (CEO, COO, etc.) or SVP role in a SaaS or Tech-enabled Services company.

I have worked in a *Private Equity* environment and at *the Enterprise*.

- recapitalized my last company to Private Equity; successful exit; and was a Partner at Deloitte and MD at Accenture

I am both *Technical* and *Strategic*.

- My degree is in Computer Science, and I was a leader in the Strategy Practice at Deloitte.

I am *Operating Executive* with *Enterprise Advisory* experience.

- CEO for 6 years and was a Partner/MD for 16 years. Appropriate roles include Strategy, Customer, Operations, and AI.

I am a *Leader of People* and a *Culture Builder*.

- Rebuilt the entire management team at SmartAction and have led hundreds throughout my career.

I can *sell, manage* clients, and I am *detailed oriented*.

- Consistently exceeded sales targets, often the closer, and responsible for entire P&L.

I have very broad *Cross-Industry* experience

- Including Hospitality, Retail, Financial Services, Healthcare, Telecom, Technology, and Services.
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PROFESSIONAL EXPERIENCE

➤ **Newport Advisors, Los Angeles, CA**

2023 - Present

A national partnership of 50 senior executives specializing in advising mid-market companies on Growth.

Partner

I advise CEOs and owners of privately held, middle-market companies on growing, investing in, or otherwise improving their businesses. I do this by serving as a CEO advisor, fractional/interim executive, or independent Board Director. I am advising the kind of companies I plan to be leading next.

➤ **Accenture, Los Angeles, CA**

2019 - 2022

Global Data & Analytics Practice

Managing Director, North America

Recruited by the Global Applied Intelligence MD. Served as leader for strategy, technical priorities, and client messaging for Accenture's North American Digital Customer Transformation Practice representing nearly \$2B in pipeline. Given the challenge of maturing Accenture's AI and Automation offering with a \$400M revenue goal in the first year, delivering \$700m.

- Positioned as lead client-facing executive for some of Accenture's largest digital transformation >\$100M opportunities.
- Developed vendor relationships with Amazon, Google, Salesforce, UiPath, and about 30 others.
- Created the art of the possible road map designing the customer experience model and strategy for Airbnb, allowing the organization to significantly reduce their nearly \$1B support costs by 25%.
- Managed the approach and senior client interaction at IHG, a \$350M pursuit to take over their entire customer service function and transform their digital interactions with guests.

➤ **SmartAction**, El Segundo, CA**2013 - 2020**

A \$15M Artificial Intelligence powered, B2B software, services, and virtual agent solutions company.

Chief Executive Officer, Board Member

Reported to the Board of Directors. Grew revenue from \$1m to \$15M and positioned the company as a leader in AI enabled customer service automation.

- Recruited by the Angel investor and original Board of Directors to replace the Founder of this AI startup and materially transform and commercialize the business after five years of nascent sales and limited market share.
- Identified and targeted, recruited, hired, and mentored a new entrepreneurial leadership team; established market presence and product strategy; and overhauled most operating practices culminating in the successful sale of the business.
- Recruited Independent Board Directors; Former CEO of Convergys, the largest call center outsourcer in the world, and Chief Product Officer from Xactly, a Vista Equity company.

➤ **Deloitte**, Los Angeles, CA Deloitte**2000 - 2013**

Head of Customer Experience / Customer Advisory Practice

Partner

Reported to NA head of Strategy; created from scratch and served as Global Lead for the Customer Advisory Practice creating a Strategy and Operations outshoot from traditional CRM consulting. Managed a \$100M annual practice in collaboration with hundreds of industry, technical, and client-specific consultants.

- In addition to leading the overall practice, was also routinely running 5-8 concurrent consulting projects while also actively pursuing another 20. Projects were often significant portions of large multimillion-dollar transformation projects.
- Developed several vendor relationships, formed alliances, and developed Go-to-Market programs for each.
- Routinely engaged by clients to improve people management performance. Developed a resilient skillset working directly with clients developing and incorporating several frameworks and best practices, which have established credibility and rapport as a go-to people management consultant.

EDUCATION**Bachelor of Arts (BA) Computer Science, Minor in Economics & Asian Studies**

DePauw University, Greencastle, IN

SELECT PROFESSIONAL SPEAKING ENGAGEMENTS

Community of Business – Conversation Series – Panelist – 2023, California State Univ Northridge

Outsourcing Technical Priorities – Execs in the Know – 2019 Microsoft Campus, Redmond, WA

Effortless Customer Experience Design – University of Wisconsin WEBC – 2018, Madison, WI

Presenting with Electrolux - Customer Response Summit – 2018, Marina Del Ray, CA

Conversational IVRs: Delivering Effective Customer Service – 2015 Mobile Voice Conference, San Jose, CA

The future of AI in Customer Service - Argyle Executive Forum San Francisco – 2013, San Francisco, CA

Deloitte POV - Nice Global Customer Conference Interactions – 2012, Nashville, TN

AWARDS

Gartner Cool Vendor Award for Customer Service, 2017 – SmartAction

Deloitte Fast 500, 2016 - SmartAction