

# Brian D Smith

Vice President Operations | Strategic Planning | Cost Optimization | SaaS Strategy

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## SUMMARY

Senior operations and business development professional with over 20 years of experience in strategic planning and global operations, expertise in cost optimization and sales management has been developed. Key achievements have included achieving a 97% customer retention rate at Cobalt Iron and delivering a 30% cost reduction for a \$530 million software division at Lexmark Enterprise Software. Passionate about optimizing operations and scaling businesses, I seek an operations leadership role where I can apply my expertise to drive sustainable, high-impact growth

## KEY ACHIEVEMENTS

### Cost Reduction Success

Managed \$530M division, reducing costs by 30%.

### Sales Growth Leader

Launched product, increasing sales by 35% in 6 months.

### Customer Retention Achievement

Achieved 97% customer retention over 3 years.

### Certification Milestone

Executed SOC 2 Type 1 and 2 in 18 months.

## EXPERIENCE

### Vice President of Operations

Lawrence, KS

#### Cobalt Iron - SaaS Based Cybersecurity and Simple Enterprise Backup

07/2019 - 01/2025

- Led cross-functional operations teams across Sales, Product Support, Deployment, and Customer Retention, driving strategic initiatives to enhance performance and alignment with company goals
- Developed, implemented and conducted a Customer Scorecard and Quarterly Business Review process, achieving a 97% customer retention rate over three years through data-driven insights and continuous improvement practices
- Designed business processes and executed initiative to achieve SOC 2 Type 1 and Type 2 Certification in 18-month timeframe
- Developed and implemented monthly SaaS KPI reporting, enhancing operational efficiency, transparency, and accountability to the Board of Directors
- Spearheaded the Vendor Management Process, guiding vendor selection, contract negotiations, and in-depth risk assessments to build strategic partnerships that aligned with organizational objectives and drove operational efficiency

### Vice President of Client Alignment

Overland Park, KS

#### Netsmart

03/2018 - 07/2019

- Executive Sales Leader overseeing a team managing over 500 healthcare clients in the Western Region
- Partnered with clients to align business strategies and develop joint strategic plans
- Led all planning and forecasting activities aimed at driving revenue growth among the client base

### Chief Operating Officer

Lenexa, KS

#### Aptora inc

12/2016 - 03/2018

- Executive leader of Sales, Marketing, Technical Support, and Product Development
- Launched a hosted product offering, contributing to a 35% sales increase in the second half of 2017
- Developed new revenue streams, increasing revenue by 7% in 2018

### Vice President - Global Sales Operations

Lenexa, KS

#### Perceptive Software / Lexmark Enterprise Software

11/2013 - 04/2016

- Led an 85-member global team across Asia, Europe, and the U.S. to manage a \$530M software division, driving acquisition integration, quote-to-cash processes, master data management, and training
- Integrated international teams and managed six acquisitions, reducing operational costs by 30%
- Drove Master Data Management process to integrate acquired companies on to Lexmark Salesforce.com platform
- Closed over \$400M in revenue across 1,000+ sales
- Established dedicated Deal Desk team to take ownership and improve complex quoting process

### Director Sales Enablement

Shawnee, KS

#### Perceptive Software

06/2007 - 11/2013

- Promoted to lead Global Pre-Sales and Sales Operations, growing a team from 6 to 80 worldwide
- Implemented process improvements and supported global sales associates on all technical components of the sales lifecycle
- Spearheaded pre-sales activities across multiple industry verticals, driving a 5X increase in revenue growth

### Manager Sales Engineering

Shawnee, KS

#### Perceptve Software

08/2004 - 06/2007

- Developed a Product Demonstration Certification Process directly leading to more consistent and focused product presentations
- Established Post Install Assessment Process resulting in increased customer satisfaction and retention

## EXPERIENCE

### Manager - Systems Development

[Sprint](#)

Ks

06/1999 - 01/2004

### Independent Consultant

[Anthem inc](#)

Cincinnati, OH

01/1998 - 06/1999

### Analyst

[Accenture](#)

Kansas City, MO

06/1996 - 12/1997

## SKILLS

Billing and AR Management, KPI Reporting, Budget Management, Client Relationship Management, Strategic Planning, Negotiation, Sales Operations, Team Leadership, Direct Sales, PMO, Artificial Intelligence, Data Integrity, CRM, Sales Forecasting, GTM, Agile Methodology, Project Management

## EDUCATION

### MBA

University of Notre Dame

South Bend, IN

### B. S Business Administration

Universty of Kansas

Lawrence, KS

## TRAINING / COURSES

[Generative AI for Business Leaders - Coursera](#)

[Google AI Essentials](#)

[Prompt Engineering for Generative AI](#)