

Dear Client,

I work with founders, executives, and investors who need experienced leadership without the cost or commitment of a full-time hire.

I am a seasoned business executive and revenue leader with more than 30 years of experience helping organizations launch, scale, and stabilize sales and operational functions across financial services, energy and ESG solutions, specialty manufacturing, transportation, and technology-enabled services.

Throughout my career, I have served as both an operator and advisor—often stepping into complex or transitional environments where clarity, execution, and speed matter most. I specialize in quickly diagnosing commercial challenges, identifying high-probability revenue opportunities, and building practical go-to-market strategies that deliver measurable results.

My background as a founder, partner, and senior executive has given me a deep appreciation for capital efficiency, accountability, and outcomes. Clients engage me when they need:

- Interim or fractional sales leadership
- Revenue strategy and go-to-market design
- Business development acceleration
- Market entry or product repositioning
- Executive-level guidance paired with hands-on execution

I am known for navigating complex negotiations, building trust-based client relationships, and aligning sales strategy with broader operational and financial objectives. Whether supporting a growth-stage company, a PE-backed portfolio business, or an established organization facing change, my goal is always the same: create momentum quickly and leave the business stronger than I found it.

I would welcome a conversation to explore how fractional support could help you achieve your near- and mid-term growth objectives.

Best regards,


**Jan Levine**

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## JAN LEVINE

Fractional Sales & Growth Executive

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### EXECUTIVE SUMMARY

Fractional sales and growth executive with 30+ years of experience helping organizations increase revenue, enter new markets, and navigate complex operational challenges. Proven operator with a founder's mindset and a track record of building and leading operational and sales initiatives across energy/ESG, specialty manufacturing, transportation, technology platforms and financial services.

Known for rapid assessment, practical strategy, and hands-on execution that delivers measurable results.

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### FRACTIONAL & ADVISORY EXPERTISE

- Founder & Executive Advisory
- Market Entry & Product Positioning
- Revenue Strategy & Go-To-Market Design
- Complex Negotiations & Enterprise Accounts
- Fractional CRO / Head of Sales
- Business Development Acceleration
- Sales Team Buildout & Optimization

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### PROFESSIONAL EXPERIENCE

#### **SCORE – Certified Business Mentor**

*Dec 2024 – Present*

Advise startups and small businesses on sales strategy, revenue growth, market positioning, and operational execution. Support founders navigating early traction, scale-up challenges, and strategic pivots.

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**Bankers Life – Financial Professional**

*Dec 2023 – Present*

Top 10% producer nationally. Provide insurance, retirement, and financial planning solutions while leveraging consultative sales and relationship-based growth strategies. 2024 Rookie of The Year

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**SynerX, LLC – Chief Executive Officer**

*May 2020 – Nov 2023*

Led commercialization of a new fuel optimizer, leveraging deep experience in oil & gas remediation and transportation operations. Guided market entry, partnerships, and revenue strategy in energy-adjacent markets.

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**Business Benefits Solutions – Co-Founder & EVP**

*Nov 2018 – Mar 2020*

Built a disruptive, low-cost benefits consulting platform focused on employee retention and cost reduction. Led sales strategy, partnerships, and client acquisition efforts.

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**Global EcoSciences, Inc. – President & CEO**

*Mar 2015 – Oct 2018*

Led development and commercialization of innovative ESG and environmental remediation solutions. Delivered projects for major energy companies including Sunoco, Exxon, and Gulf Oil.

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**kloudtrack® – Co-Founder & CTO**

*Oct 2003 – Jan 2015*

Architected and led a secure cloud-based compliance, data and workflow management platform for the financial services companies including Jefferson-Pilot and Lincoln Financial. Oversaw product strategy, enterprise sales support, and client implementations.

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**Imageers, Inc. – Founder & President**

*Jan 1994 – Sep 2003*

Created the industry's first integrated imaging and data management system (TIMS). Secured enterprise clients including SG Warburg, Texaco, Turner, and Coty.

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**United Engineers – Regional Vice President (NE)**

*Jan 1990 – Dec 1993*

Led sales and operations across engineering, specialty manufacturing, IT consulting, and contract engineering divisions. Clients included United Technologies, GE and Purolator

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**Investors Diversified Services (Ameriprise) – Registered Representative**

*Jan 1988 – Dec 1990*

Top-performing advisor; finished Year 2 ranked #3 in sector and #5 overall out of 5,000 representatives.

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**EDUCATION****Questrom School of Business – Boston University**

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**Public Sector Advisor****NIST (National Institute of Standards and Technology)**

*Jan 2011 -December 2014*

Served as leader of the Reference Architecture Strawman Committee from which the currently published NIST Reference Architecture was developed and subsequently serves as the baseline for the federal FedRAMP certification standards.

Further actively served on the NIST Service Model Clarification Committee that refined the Reference Architecture definitions prior to the RA being released.

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**FedPlatform.org****Director of Compliance**

*Apr 2012 - Jan 2015 (2 years 10 months)*

FedPlatform.org was a nonprofit organization whose purpose was to facilitate the education of Federal Government organizations and their employees about Cloud Computing.

The organization helped alleviate potential confusion surrounding the federal movement toward cloud computing technologies by providing a focused, unbiased information platform.

## **Canadian Cloud Counsel**

### **Advisory Committee Member, Government Committee and Panel Contributor**

2012 - Jan 2015 (3 years)

Recent activities include appointment to the Advisory Committee, a panel appearance at CloudLAUNCH discussing Shared Services-The Case for Government Cloud Computing and inclusion on the CCC Government Committee

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## **LICENSES & CERTIFICATIONS**

GA, NC & SC Licensed – Health, Life, Annuities, Medicare & Long-Term Care  
Certified Financial Planner (CFP)

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## **INDUSTRY EXPERIENCE**

Energy & ESG • Financial Services • Insurance & Benefits • Transportation  
Specialty Manufacturing • SaaS & Cloud Platforms • IT Systems & Workflow