

## Sales Executive

**Client-focused leader with extensive experience building high-performance organizations and delivering sales results.**

Executive sales leader with a proven track record of consistently exceeding team and organizational performance goals in start-up and high-growth environments. Demonstrated ability to craft winning go-to-market strategies and drive revenue growth for companies in the insurance, financial, human capital management, high-tech, and SaaS sectors. Expert ability to build effective playbooks and training programs for novel product or service segments, markets, or verticals. Strong skill set in relationship building and communications to articulate value and increase engagement in both inside and outside sales teams.

## Areas of Expertise

- Team Building
- Process Development
- SaaS - Technology
- Go-To-Market Strategy
- Inside Sales/SDR Models
- Recruitment and Training
- Client Engagement
- B2B – B2C
- Sales Forecasting
- Business Development
- Revenue Management
- KPIs and Metrics

## Accomplishments

- Piloted a major organizational and cultural restructuring with the aim of achieving a five-year target of \$120M in annual sales. Achieved sales growth from \$8M to \$20M in 18 months. Exceeded EBITDA target in year 1 by 41%.
- Scaled Inside Sales team from 6 – 18 in 12 months, created new SDR team
- Built \$6B in incremental sales revenue throughout in private, public, and private equity held organizations. Launched national division for human capital management firm, targeted at enterprise level deals to support annual sales objectives of \$60M+.

## Career Experience

**GreenLight IoT Austin, Texas**  
President

**2022 – Present**

Pre-Series A Firm. Overseeing all aspects of company: GTM, operations, finance, capital raising, human resources. Charged with raising \$2mIn in the first 12 months, along with launching our next MVP.

**PlanSource Austin, Texas**  
Regional sales Director - West

**2021 – Present**

Oversee team of four enterprise sales executives. Supporting their success in the broker and direct to market channels.

**Shinjiru LLC, Austin, Texas**  
CEO and Coach

**2019 – Present**

Develop and implement scale up strategy for a start-up franchise executive coaching firm. Coach business leaders through the process of defining and implementing a business vision. Evaluate leadership and team effectiveness through coaching sessions.

- Created \$150,000 in first year revenues.
- Supported entrepreneurs in executing business plans to increase profitability by 40% - 60%.

**PeopleFacts, San Diego, California**  
Senior Vice President, Customers and Growth

**2017 - 2019**

Restructured sales organization and culture to target 12-time software sales increase over five years. Created a 162-page playbook for success with new go-to-market methods and strategies. Developed and launched a training program focused on solution selling behaviors. Built and articulated a client engagement program for existing customers and closed deals. Refreshed the compensation model and sales process, adopting a metric-driven culture and highlighting key performance indicators to build engaged teams. Advised the board and investment committee on overall company vision. Generated annual budgets and forecasts to support business planning.

- Scaled Inside sales team from 6 – 18 in 12 months
- Created new SDR team to support revenue growth goals
- Created 90-day quick start training for new sales members
- Created new recruiting and interview program to support team growth
- Successfully integrated 4,000 new customers during a large-scale acquisition
- Grew revenue from \$8M to \$20M and EBITDA by 20% within 18 months

#### **First Advantage Corp., Irvine, California**

**2016 - 2017**

Vice President, Enterprise Sales, US and Canada

Recruited to execute sales transition strategy to additional sectors. Crafted sales strategy and process, launching new vertical go-to-market strategy. Hired, onboarded, and mentored sales representatives. Led sales forecasting and budgeting to support profitability analysis and operational decision making.

- Drove revenue objectives more than \$60M per year.
- Recruited 15 inside and outside sales representatives, and developed an upsell team to rapidly upscale the organization's selling capabilities.

#### **Trinet, Irvine, California**

**2011 - 2016**

Regional VP of Sales

Targeted new customers via cold-calling and building a referral network. Managed and trained a regional sales team. Drafted sales plans and goals. Oversaw operations for a recently opened office with 12 direct reports and a \$65M annual budget. Cultivated and coordinated channel partnerships.

- Recognized as the top-ranking sales office nationally out of 20 locations, achieving and exceeding \$50M sales goals.
- Launched national enterprise customer division focused on large scale opportunities valued at \$10M+.

#### **Franklin Group LLC, Irvine, California**

**2009 - 2011**

Sales Manager

Established the organization's west coast operations. Created the sales strategy and business processes. Recruited and trained sales representatives. Monitored the sales pipeline and leads to ensure sales growth. Cultivated mid-size business prospects via cold calling.

- Created the sales program from the ground up to support annual sales of \$3M
- Contacted 70 B2B prospects daily to meet quotas and achieve sales performance metrics.

#### **Edelman Financial Advisors, Irvine, California**

**2008 - 2009**

Regional Vice President, Wholesaler

Built the wholesale division for the Western USA. Created and implemented go-to-market strategies. Articulated value to deliver on revenue targets. Developed training and education programs on products, sales process, operational best practices, and marketing. Delivered training to advisors across the territory.

- Secured \$100M+ in new business commitments within 12 months.
- Recognized as top achiever nationally in 2008 and secured the highest rate of assets under management across the Wholesale division.

## **Additional Experience**

**BISYS Fund Services**, Regional Vice President, Head of Mutual Fund Sales

Honolulu, HI

**Merrill Lynch**, Wealth Management Advisor,  
**Credit Suisse First Boston**, Vice President, Hedge Fund Sales & Equity Finance,

Honolulu, HI  
New York, NY and Tokyo, Japan

## **Certifications**

**Certified Executive Coach** – ActionCOACH Coaching program - 2020

**Certified Sales Coach** – ActionCOACH Coaching program - 2019

**Certified DISC Practitioner** – Assessments 24x7 - 2020

## **Education**

**Bachelor of Science in Business Administration, Finance and Insurance**

University of Hartford, Connecticut