

**CEO ■ COO ■ MANAGING / EXECUTIVE DIRECTOR**

*Fueling multimillion-dollar growth, international business expansion, and new product/service launch within startup, early-stage, and high-growth environments*

**Cutting-edge visionary with extensive experience leading a full spectrum of business operations within diverse industries and environments** (high-tech startups, growing businesses, nonprofit organizations). Proven success benchmarking pace-setting results across key performance metrics (sales, revenue, income, quality, production, and service). Track record includes leading strategic initiatives to catapult per annum revenue by tens of millions of dollars, penetrate overseas markets, and capture Fortune 500 accounts. Adept negotiator of multimillion-dollar deals and expert in structuring robust intellectual property/licensing agreements. Highly respected builder and leader of winning management/sales/marketing/legal/technical teams; able to assemble, motivate, and retain a quality workforce of talent.

**Demonstrated ability to fuse business, financial, and technology interests** into cohesive, driven, and focused operations. Product/service launch strategist with strong marketing bent; create new products, brands, and revenue streams and cost-effectively position offerings within segment. Executive-level understanding of fiscal management; skilled in budgeting, cash flow management, and investment strategies creating strong, sustainable P&L scenarios. Builder of critical partnerships and strategic alliances; able to salvage damaged relationships, find value in divergent viewpoints, resolve conflicts for win-win outcomes, and unite fractionalized groups for a shared sense of purpose.

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**Areas of Expertise**

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- Executive Leadership & Supervision
- Business Operations Management (Profit/Nonprofit)
- Complex Negotiations & Deal Structuring
- Budget & Sales Forecasting
- Due Diligence/Acquisition Strategy
- Business Development & Market /Channel Expansion
- Strategic & Tactical Planning/Corporate Vision
- Cash Flow Management
- Strategic Partnerships & Alliances
- New Product Development & Launch
- Marketing & Sales Program Leadership
- Team Building & Training
- P&L/Fiscal Management
- Intellectual Property (Trademarks/Patents/Licensing)

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**Career Progression**

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SMART SOFTWARE – Fresno, CA

*Small software development firm specializing in information integration and analysis.*

**CEO, 1993 to Present**

Wholly accountable for leadership of strategic direction, tactical planning, and daily operational supervision of sales, marketing, business/product development, finance, legal matters, and personnel administration. Challenged to build a first-class team, generate R&D and operational funding, and ensure strong sales pipeline/market acceptance of all new services and products despite cutthroat competition within the software development industry. **Key Contributions:**

- **Recruited top-tier, international team of developers spanning four continents** to achieve crucial corporate objective of obtaining unsurpassed technical talent assets. Established project goals, priorities, and timelines and successfully achieved the delicate balance between encouraging creative talents/ideas while maintaining focus on market needs, business objectives, and timely deliverables.
- **Leveraged expert negotiation and partnership-building skills to achieve rare client funding (six- and seven-figures) of Smart's R&D efforts** without compromising licensure/ownership rights of all products. Efforts enabled development of state-of-the-art software program that fulfilled unique marketplace niche, outperformed major competitors, and **captured million-dollar business** from major financial institutions, including World Bank (one of the top depositories in Europe).
- **Proved the ability to architect and solidify win-win outcomes under difficult circumstances;** identified limited market appeal of company's initial product prototype and convinced client funder to forgo delivery in exchange for source code copy and unfettered product rights. Adept handling of situation not only averted legal action, but also resulted in winning a strong customer reference that proved key to capture of subsequent **seven-figure contract**.
- **Directed ironclad, international patenting and trademarking of all products.** Located and retained top IP legal team to maximize ROI on costly patent investments; won multiple favorable, broad patents (despite challenges presented by inspector-led review of all European patents); and jointly developed cost-saving legal strategy that **saved \$18K in patent fees per country** without sacrificing ability to prosecute infringements.

## SMART SOFTWARE – *continued*

- **Developed and negotiated complex licensing agreements in Europe and Canada, facilitating mission-critical international business growth.** Articulated rights to ownership and incorporated key measurements to enable fail-safe auditing and identification of potential violations, winning praise from client legal teams for thoroughness and fairness of agreements.
- **Organized consulting business to build funding basis for software development efforts, winning engagements** with clients including JKL Company, The Bank, and Society of CPAs.
- **Demonstrated sound fiscal management and contingency planning acumen** that allowed self-funding of operations during a time when East Coast VCs were largely funding dot-com businesses exclusively. Negotiated large lines of credit with The Bank and Major Bank in company's early stage that assured company access to cash at all times. Maintained company solvency through 2001-2002 financial crisis within environment where hundreds of competitors were forced to close their doors. Never failed to meet payroll, tax, or billing obligations and continued to provide market-level salaries and benefits.

## BEST SOFTWARE – Orlando, FL

*Worldwide software company specializing in custody and trust operations products for large banks and stock exchanges.*

### **Co-CEO, ABC/XYZ Inc., 1986 to 1992**

One of the few executives retained following acquisition of ABC Computers, with responsibility for direction of all global business operations (legal, finance, personnel, sales, and marketing). Constructed a lean and highly efficient organization, supervising five managers overseeing peak business staff of 75 out of 200 total staff. Charged to meet aggressive profit goals by capturing new international business; optimizing workforce productivity, efficiency, and workflow; and maximizing company marketing spend. Served as member of executive management team with fellow CEO (Technical and Systems areas), with accountability for establishing organizational vision and direction. Interfaced extensively with Best Software executive in charge of Worldwide operations (vice-chairman level). **Key Contributions:**

- **Grew company from \$10M to \$50M in per annum revenues**, strategizing business development efforts to outperform corporate targets every year of tenure. Personally led all large contract negotiations (\$10M+), traveling extensively worldwide to capture strategic business wins with major clients including the Stock Exchange, The Bank, Major Bank, and the International Bank.
- **Reversed maintenance services from a cost center to a profit center**, achieved **better balance between amortization and depreciation** through clever use of software functionality to build new products, and instilled a shared vision of selling more profitably to established accounts. Efforts resulted in **generating an average 233% increase in per-account profitability** during a time when formal "account profitability" was still a relatively new concept in the industry.
- **Engineered crucial business tools and processes** to dramatically accelerate **complex sales cycle** from 18 months to nine for a **\$20M** revenue surge within first nine month's of launch.
- **Personally oversaw two major litigation actions involving key clients, with the potential for serious damage to company's reputation and intellectual property rights.** Both were successfully settled and both clients were retained and remained active customers for years.
- **Investigated potential acquisition targets;** conducted thorough due diligence and on-site visits to uncover "hidden" problems, illegal or dubious practices, and avert losing investments.
- **Directed company marketing and PR initiatives**, strategizing with marketing VP to develop cost-effective campaigns fusing marketing and sales goals into one cohesive, interwoven plan.

ABC COMPUTERS (Parent company of XYZ, INC. Acquired by BEST SOFTWARE in 1986) – Orlando, FL

*Holding company of consulting/software development corporation offering computer and financial services to Wall Street clientele.*

### **Senior Vice President, XYZ, Inc., 1984 to 1986**

### **Vice President of Sales & Marketing, XYZ, Inc., 1980 to 1984**

Advanced to increasingly responsible senior management posts, with ultimate authority over all sales and marketing functions and two business lines (software, consulting) and their attending staffs (15 total). Reviewed and approved sales plans, negotiated all large (over \$2M) contracts, opened major accounts, and fulfilled corporate objectives of building sales revenues and increasing account profitability. **Key Contributions:**

- **Built consulting business from \$5 to \$8M in sales** and launched software business startup **from zero to multimillion-dollar levels** (ultimately producing **50%** of entire company revenues).

## ABC COMPUTERS – *continued*

- **Led multi-tiered initiatives that propelled four-fold company growth and international expansion** from North America to Europe and Asia. Phased out non-product consulting services to instill organization-wide focus on software products, increased European business by **200%**, produced **40%** of parent company's annual income, **opened vertical markets** to international stock exchanges, and **innovated strategies** to effectively operate in international community.
- **Positioned operation for lucrative global expansion**, convincing corporate executives to alter view of the marketplace from a domestic focus to an international scope.
- **Negotiated dozens of multimillion-dollar software agreements** to open major new accounts (e.g. Foreign Bank, The Bank, and Major Bank), **doubling sales every six months for four consecutive years** (1980 to 1984).
- **Broadened software business PR** by leveraging established consulting relationships to win **crossover and referral business**. Substantially expanded software product visibility as primary company representative at domestic and international trade shows and conferences.
- **Recruited, trained, and mentored** new sales reps, developing a top-performing team.

## MASTER SERVICES, INC. – New York, NY

*Minority-owned building maintenance and personnel services businesses.*

### Vice President of Sales, 1978 to 1980

- **Delivered \$2M contract with *The Newspaper*** that provided corporation with cash flow and revenue for its first two years of existence that allowed low-margin maintenance business to become established and grow.
- **Set up sales planning and monitoring systems** and assisted in prospecting for building maintenance clients.

## JOBCO – New York, NY

*Non-profit company assisting welfare recipients with job market re-entry.*

### Vice President of Marketing & Development, 1976 to 1978

- **Revamped both Marketing and Development departments** to create finely honed corporate focus, key to a substantial subsequent increase in the number and quality of new employers and company's highest-ever placement levels.
- **Directed job development programs** that improved average tenure of job placements to historic durations.
- **Liaised effectively between other corporate departments**, winning accolades for impressive gains in cooperative inter-departmental relationships and initiatives.

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## Education

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TEXAS UNIVERSITY – Houston, TX – **Bachelor's Degree in English; Minor in Business**

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## Community Involvement

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**Board Member**, Community Group – Fresno, CA (1997 to 1999)

**Board Member**, Community Service – Fresno, CA (1998 and 1999; 2000 to Present)

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Home: 555.278.4581 ■ Office: 555.278.5872 ■ Cellular: 555.578.2410 ■ Email: [angela@excresumes.com](mailto:angela@excresumes.com)

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