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@newplanllc 

A senior leadership position at an organization with a transformative mission, clear and aggressive business objectives, and strong support from investors and other key stakeholders.

Skills

- World-class strategist for start-up and growth stage technology companies
- Corporate development experience supporting M&A, fundraising, and partnership transactions
- Scaling of product or services companies as a CEO
- Business and operations planning to support growth or restructuring
- Working effectively with Board Members and management to achieve key milestones
- Effectively pursuing and winning new business from large companies

Experience

JAN 2007 – PRESENT

Managing Partner / NewPlan, LLC, Gaithersburg, MD

Founded NewPlan to provide two types of services to growth companies in the technology industry: (1) Strategic and business planning services that drive transactions, such as fund-raising or M&A and (2) outsourced executive management to achieve key milestones that increase enterprise value. Key accomplishments include:

- 300+ engagements for companies in many technology-driven market segments. Clients have raised \$600+ million in funding in Seed through Series B rounds, achieved rapid growth, and successfully executed M&A transactions.
- Clients have included: CACI, DynCorp, Intel, Business Forward, Appsentia, Mobile Posse, StoredIQ (now IBM), Acceller, DfR Solutions (now Ansys), Fintrac, Foley & Lardner, iGov, Notable Solutions, Agency Q, Perthera, Truestone Federal, Questudio, The Brand Gallery, New Health Analytics, IQS (now Cority), Columbia Technologies, Blue Ridge Networks, Peaxy, Avatech Solutions, Trucker Tools, Waterfall, Optimoz, Global Environment Fund, and Amplifinity.
- Markets served have included: SaaS, Cloud, Mobile Advertising, Applications Development, Government IT Services, Document/Content Management, Marketing/Advertising Services, Channel Management, Healthcare IT, and Mobile Command and Control Systems.

JUNE 2016 – PRESENT

Board Member / iGov, Inc, Reston, VA

Outside Director for \$150 million government contractor specializing in specialized communications and computing resources for the warfighter.

- Chair, Audit Committee.
- Provides oversight on company operations and financial performance.
- Offers to significant input to corporate strategy and business development pursuits.

JUNE 2015 – DEC 2016

Managing Director / Ten Mile Square, Falls Church, VA

Ran strategy services and business development for Ten Mile Square working with clients in four ways:

- Long-term strategic planning
- Preparing for important transactions including private placements and M&A events
- Improving daily operations
- Providing on-going strategic advice to CEOs and Boards of Directors.

In addition, held primary responsibility for finding new clients for Ten Mile Square's technology services business, which included technology architecture, product management, continuous delivery, and software development services.

OCT 2014 – JUNE 2015

Managing Director / The Fahrenheit Group, Richmond, VA

A fast-growing consultancy that specializes in strategic, financial, and HR consulting at the CEO and Board Level. Clients span multiple industries and range in size from pure start-ups to \$250 million in revenues.

- Established strong beachhead in greater Washington market – concentrating on high tech and government contracting market.
- Added key clients in the learning management, Cloud infrastructure, and software defined storage markets.

MAR 2012 – SEPT 2014

CEO / VIACode Consulting, West Hartford, CT

Led a fast-growing, \$8.4 million, 150-person offshore software development company with overseas operations in Russia and Belarus and deep expertise in business applications, mobile, big data, and IT Management software – particularly for Microsoft-centric customers.

- Grew revenues by 45 percent in two years.
- Expanded service offerings beyond .Net development to Java/open source stack, mobile, Big Data, and Cloud.
- Executed large, tier one client engagements, including Microsoft, Wolters Kluwer, NetApp, Amazon, and Agilysys.
- Restructured operations in Russia to unify ownership to promote smoother operations, comply with local financial regulations and tax laws, and facilitate an eventual exit.
- Created partnerships with technology services companies that brought new clients and enhanced expertise.

JUNE 2003 – DEC 2006

Co-Founder & Managing Director / Chessiecap Securities, Bethesda, MD

Co-founded investment bank with a unique operating model that combined value-enhancing strategy and technology consulting services with the execution of private placement and M&A transactions. Managed the strategy practice.

- Created proprietary methodology for preparing companies for M&A and private placement transactions, which includes development of transaction strategy, business and operations planning, presentation development, financial analysis, management coaching, due diligence preparation, and candidate identification.
- Executed detailed, due diligence engagements to support public and private equity investments
- Clients have included: Avatech Solutions, iDEFENSE, Blum Capital Management, DrFirst, IQS, MobileComNetworks, Dynamic Technology Systems, Symbol Technologies, Mobile Posse.
- Markets served include: PLM, CAD, Healthcare IT, Voice Over IP, Content and Digital Asset Management, IT Security, Mobile Marketing, IT Infrastructure Software, Enterprise Software.

JAN 2002 – JUNE 2003

Managing Partner / CXO Strategy, Gaithersburg, MD

Founded a strategy and business development consultancy that built executable business and operating plans, developed partnerships to expand market reach, and improved client positioning to drive growth. Clients included:

- Avexus, Inc., a provider of ERP software for management high-value assets, such as airplanes and ships. Served as Acting VP, Business Development, and created the business plan that has raised \$20 million.
- Telus, Inc. – second largest telephone company in Canada. Built the Voice Over IP Platform business plan.
- Silver Lake Partners, a multi-billion-dollar IT and telecom private equity fund. Executed three engagements in support of the potential acquisition of two leaders in electronic commerce.

JAN 1997 – DEC 2001

Co-Founder & Senior Vice President / Operon Partners, Gaithersburg, MD

Created and built a successful strategic and business planning practice that created fundable and executable strategies for start-ups, growth companies, and divisions of Global 2000 companies.

- Personally marketed and led strategic planning practice that generated \$2+ million per year from 1997 – 2001.
- Created a strategic planning process that drove successful funding events for many tech start-ups – including JustTalk, Onesoft, telezoo.com, FullScope, Online Benefits, Extol, Riva Sports, Avexus, Omnivolve, and MCCI.
- Instrumental in strategic planning efforts that led to eBusiness break-out plays for several Fortune 1000-level companies, including Telecom New Zealand, BCE Emergis (Bell Canada), and Telus.

SEP 1995 – SEP 1996

Product Manager / Deloitte & Touche Consulting Group, Washington, DC

Responsible for the marketing of Deloitte & Touche information products in all convergence-related industries – telecommunications, eBusiness, Internet, content, and cable.

- With a joint venture partner, developed and launched convergence.d&t, a monthly subscription service that delivered decision-making information for senior executives and marketers related to convergence industries.
- Negotiated 10+ content licensing agreements with publishers to supplement Deloitte & Touche content.
- Created and ran all go-to-market efforts, including sales, PR, and marketing campaigns to CIO-level buyers.

MAR 1990 – SEP 1995

Various Roles / GE Information Services, Rockville MD

Served in a series of increasingly senior-level positions in strategy and business development.

Director, Business Development (GENie Online Services)

1994 – 1995

- Led business development team for sales to affinity groups. Closed 15 opportunities in a six-month period.
- Worked with tier 1 investment banker to bring GENie to market, including generation of the memorandum, developing the corporate presentation, creating the candidate list, and actively managing opportunities.

Manager, Market & Competitive Analysis

1993 – 1994

Market Analysis Manager

1990 – 1993

- Created market/competitive analysis processes that resulted in over \$60 million in new and retained business in 1993. Processes adopted by five GE businesses as a best practice.
- Led team of five that provided market and competitive analysis support to senior executives and a global field sales organization of 1,000 sales, services, sales support, marketing, and product management professionals.
- Winner, GE President's Award, 1993, for work in market and competitive analysis.

JUNE 1987 – JAN 1990

Various Positions / British Telecom (Dialcom), FileTek, and US Navy in Rockville, MD

- Market Analyst
- Technical Writer
- Human Resource Manager
- Historian

Education

MAY 1983

B.A. History / University of Virginia, Charlottesville, VA