

EXECUTIVE PROFILE

Executive leader with 22 years of experience building and scaling a national, multi-site, B2B services organization through operational discipline, technology enablement, and leadership development. Expertise in translating strategy into robust operating models and integrated business systems that drive alignment, accountability, and sustained growth.

Executive Highlights

- ◆ Scaled operations from \$2.4 million to over \$70 million in annual revenue, expanding from a small regional business to a national enterprise serving major institutional clients.
- ◆ Directed corporate strategy and cross-functional executive leadership across 180+ employees and four offices within a complex, outsourced service model delivering a broad range of real estate services nationwide.
- ◆ Drove enterprise-wide technology transformation through the development of a proprietary platform that enabled growth and scalability and was ultimately productized as a white-label/SaaS solution.
- ◆ Engineered operating models, business processes, and performance metrics to optimize service delivery, strengthen accountability, and drive measurable gains in efficiency and profitability.
- ◆ Built organizational capability through performance management, talent development, and succession planning, establishing a strong leadership pipeline to support long-term growth.
- ◆ Led financial planning, forecasting, and resource allocation to maintain profitability and financial stability through changing market cycles.
- ◆ Navigated the company through its sale in 2025, culminating more than two decades of growth and transformation.

Executive Expertise

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| ◆ Executive Leadership | ◆ Operational Strategy & Performance Optimization |
| ◆ Technology Strategy & Enterprise Systems | ◆ Talent & Leadership Development |
| ◆ New Business Development & Revenue Growth | ◆ Customer Experience & Service Delivery |
| ◆ P&L Accountability & Financial Stewardship | ◆ Corporate Governance & Board Relations |

PROFESSIONAL EXPERIENCE

A2Z FIELD SERVICES | 2004–2026 | Plain City, Ohio

Chief Executive Officer (2015–2026)

Held executive responsibility for a national, B2B real estate services organization spanning operations, technology, business development, human resources, finance, and strategic planning. Maintained a strong focus on operational transformation through technology, process optimization, and leadership development to drive performance, profitability, and long-term growth.

Selected Accomplishments

- ◆ Led national operations across 10 corporate departments, generating over \$70M in annual revenue, supported by 180+ employees and an outsourced service network of more than 10,000 field professionals.
- ◆ Oversaw complex service delivery across a rolling inventory of 10,000–25,000 properties, executing an average of 60,000 inspections and service orders monthly across multiple client programs.
- ◆ Spearheaded the continued design and evolution of Compass 360 Enterprise™, a proprietary enterprise platform built with white-label capabilities for external commercialization as a SaaS solution; championed automation and AI implementation to streamline workflows, accelerate access to information, and increase productivity.
- ◆ Drove continuous improvement through process redesign, workflow optimization, performance metrics, and cross-functional collaboration to streamline execution and boost efficiency.
- ◆ Built and sustained a high-performing culture through operational discipline and investment in employee and leadership development, resulting in an average employee tenure exceeding 12 years.
- ◆ Directed financial planning, forecasting, pricing strategy, and resource allocation in alignment with business priorities to drive profitability and growth.
- ◆ Strengthened institutional client partnerships through executive engagement and performance management, sustaining an average account tenure exceeding 15 years.
- ◆ Repositioned the business in response to significant industry change through service diversification and continued technology investment, broadening organizational capabilities and strengthening the company's market position.
- ◆ Partnered with the Board on strategy and governance, providing financial and operational insights to inform enterprise decisions and key business priorities.
- ◆ Guided the company's sale in 2025, overseeing the acquisition process from negotiation through closing and subsequent transition.

Senior Vice President (2012–2015)

Led multi-site operations, technology, finance, business development, and human resources, driving organizational alignment, performance, and continued growth.

Selected Accomplishments

- ♦ Directed company-wide operations through a team of 10+ managers, building the leadership structure and management discipline needed to support the company's increasing scale and complexity.
- ♦ Advanced the functionality of the company's proprietary operating platform, improving workflow automation, operational visibility, and data-driven decision-making.
- ♦ Designed and standardized processes and workflows across functions and locations to enhance consistency, service quality, operational efficiency, and execution.
- ♦ Implemented a performance framework, training programs, and structured communication protocols that increased accountability, built management capacity, and accelerated succession readiness.
- ♦ Led enterprise-wide financial planning to enable continued geographic expansion and new service development while maintaining strong profitability.
- ♦ Broadened organizational capabilities through the introduction of new products and service offerings, strengthening client relationships and the company's competitive position.

Director of Operations | SVP of Operations (2007–2012)

Promoted from Controller to Director of Operations and subsequently SVP of Operations, assuming progressively broader responsibility for operations, technology, business development, and organizational growth.

Selected Accomplishments

- ♦ Secured multi-state contracts with HUD and Fannie Mae, generating approximately \$68M in annual revenue, significantly increasing the company's national presence and market position.
- ♦ Expanded the company's operating footprint through the launch of three regional offices, leading multi-site operations and developing the management teams needed to support continued national growth.
- ♦ Directed technology strategy and the design of the company's proprietary operating platform to optimize workflows and enable consistent, efficient service delivery at scale.
- ♦ Established core operating processes to support increasing scale and complexity, streamlining execution, reducing costs, and enhancing service quality.
- ♦ Created training programs and performance standards that strengthened workforce capability and operational consistency.
- ♦ Cultivated executive client relationships that strengthened long-term partnerships and informed revenue forecasting and financial planning.
- ♦ Earned a significant ownership interest in the company in recognition of leadership and long-term contributions.

Controller (2004–2007)

Provided financial leadership while analyzing operational performance, productivity, pricing, and cost drivers to support business planning and decision-making.

Selected Accomplishments

- ♦ Built and led the accounting function, establishing the team and processes to support the company's financial operations.
- ♦ Created financial and operational reporting and analytics to evaluate productivity, pricing, costs, and performance.
- ♦ Designed and implemented business processes that improved productivity, efficiency, and consistency across operations while reducing costs.
- ♦ Strengthened cash flow management through budgeting, forecasting, and disciplined cost control.
- ♦ Established and monitored financial and operational controls that reinforced compliance and accountability.
- ♦ Managed relationships with banking partners, external auditors, legal counsel, and vendors.

EDUCATION

The Ohio State University, Fisher College of Business | Columbus, Ohio

Bachelor of Science in Business Administration, Accounting Specialization

AREAS OF EXPERTISE

Executive Leadership ♦ Corporate Strategy ♦ Strategic Execution ♦ Capacity Planning ♦ Executive Reporting ♦ **Operational Strategy** ♦ **Performance Optimization** ♦ Operating Models ♦ Business Analytics ♦ Performance Metrics ♦ Data-Driven Decision Making ♦ Process Design ♦ Process Optimization ♦ Continuous Improvement ♦ Change Management ♦ KPI Development ♦ Workforce Planning ♦ **Technology Strategy** ♦ **Enterprise Systems** ♦ Technology Integration ♦ Workflow Automation ♦ Artificial Intelligence (AI) Adoption ♦ **Talent & Leadership Development** ♦ Cross-Functional Leadership ♦ Performance Management ♦ Succession Planning ♦ **New Business Development** ♦ **Revenue Growth** ♦ Service Development ♦ Pricing Strategy ♦ Market Expansion ♦ **Customer Experience** ♦ **Service Delivery** ♦ Client Retention ♦ **P&L Accountability** ♦ **Financial Stewardship** ♦ Financial Planning ♦ Resource Allocation ♦ Cost Management ♦ **Corporate Governance** ♦ **Board Relations** ♦ Operational Compliance ♦ Risk Management ♦ Internal Controls