

**Dave Beck**Top 50 [Innovative Influencer](#) featured on the OCBJ front page for creating [Haystax](#) ✨

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📍 Orange County, CA

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For a large company:

- VP of Customer Success, Sales Ops
- Dir of Product Management

For a mid-sized or small company:

- GM, COO or CEO

For a venture studio or accelerator:

- Studio Leader, Managing Director
- Venture Leader

SUMMARY

- 25 years of commercial leadership with functional experience in: Sales Ops, Customer Service, Sales, Product Management, Marketing Strategy, Marketing Automation
- AI-savvy, entrepreneurial, visionary, data and digital transformation leader who creates recurring revenue streams and builds a positive culture of high performing teams
- Large scale, multi-site, customer facing leadership overseeing 600 employees and P&L of \$170M
- **Strengths:** talent management, strategic planning, P&L management, process improvement, conflict resolution
- **Industries:** SaaS, Healthcare, MedTech, Comms, Media, Ent, Tech, HW, Consumer Products, Consulting

AWARDS, "FIRSTS", BROKEN RECORDS

- [Top 50 Most Influential Innovator](#) featured on [OCBJ](#) front page
- Octane: Created [Haystax](#), their first product, a SaaS predicting startup fundability with 90% accuracy, achieving \$300K ARR and break-even in Year 1 of sales
- Cognizant: 1 of 600 venture leaders chosen for Venture Studio
- Beckman Coulter / Danaher:
 - Achieved #1 Ranking in Overall Customer Support
 - Winner of President's Lean Kaizen Award
 - 4DX Award Recipient
 - Answer live rate of 88% of calls within 30 seconds
- PwC Consulting: Above & Beyond Award for Excellence

PROFESSIONAL EXPERIENCE**octane** Southern California's largest non-profit innovation ecosystem

Orange County, CA

VP & GM (Venture Leader), Haystax

01/23 - 02/24

- Conducted business model, product market fit and value proposition analysis, leading to Octane's first commercially viable product, Haystax, a SaaS for investors and accelerators that predicts startup fundability with 90% accuracy. Led all phases of product development from ideation to commercialization.
- Drove customer acquisition and revenue growth generating \$300k ARR with 1k users achieving breaking even in 1 year. Based on market learnings, determined pricing strategy and channel strategy.
- Led the business plan, market research and customer discovery efforts to size the market (TAM SAM SOM Analysis) to inform financial modeling and characterize the competitive landscape
- Directed an agile cross functional team of front-end and back-end developers, data scientists, designers and analysts working on feature design, development and measurement.
- Applied thought leadership and spearheaded the product strategy, roadmap, feature development and technical efforts leading to the world's first AI Pitch Video Analysis tool utilizing machine vision and of the world's first "13th Judge" POC utilizing Generative AI (Chat GPT) and Large Language Models (LLMs).
- Originated and trademarked the Haystax name and logo with feedback from customer interviews and focus groups
- Led the marketing strategy, segmentation, content creation, roadshow, and email drip campaign execution with A/B testing

VP, Capital & Growth

01/22 - 12/22

- Increased revenue 100% for this BU. Created a recurring revenue stream by strategically adding a CMO Peer Group.
- Facilitated \$1.3M in capital investments across 3 startups utilizing 2 SPVs (Special Purpose Vehicles)

Director, LaunchPad Accelerator

02/21 - 12/21

- Hosted 50+ pitch events. Advised founders on capital readiness, pitch decks, business plans, financial assumptions, TAM SAM SOM and connected them to mentors. Enabled reporting of startups raising \$6B in capital and \$5B in exits

Cognizant A Fortune 200 IT consulting firm with \$17B in revenue and 300k employees

Orange County, CA

AI Practice Area Leader (Communications, Media, Entertainment, Technology vertical)

01/19 - 02/21

- Oversaw an organization of 600 Data Scientists & Visualization Engineers and a P&L of \$50M. Managed service delivery and generated innovative vertical-specific solutions for clients.
- For a Top 5 US Communications company, provided oversight on a project that used ML and NLP on call center scripts to coach agent behavior and raise NPS scores.
- Served as the Partner Manager for the Google Cloud Platform (GCP) and TensorFlow partnerships. Collaborated across several workstreams including sales enablement, pipeline calls, marketing, and certifications.
- Recruited and trained 30 data scientists. Reached 100% billability generating \$2M. Significantly reduced attrition.

Venture Leader (Product Manager), Venture Studio / Accelerator Program

09/17 – 12/18

- 1 of 600 leaders selected to lead a Start-Up that applies AI/ML and NLP to streamline healthcare insurance company back office operations, particularly risk adjustment and quality.
- Conducted business model, product market fit and value proposition analysis. Achieved 9 customer validations, instead of the 3 that were required. Employed the Lean Business Canvas methodology.
- Implemented extensive customer discovery ensuring a deep understanding of pain points leading to product feature selection.
- Led the business plan, market research and customer discovery efforts to size the market (TAM SAM SOM Analysis) to inform financial modeling and characterize the competitive landscape
- Developed an MVP and pitched to the C-suite and the 50 top executives in the company at Demo Day in a theatre

Global Program Manager, Organizational Change Management (OCM) Practice

09/16 – 08/17

- Led the Process and Change Management workstreams for global Sales Cloud salesforce implementation with 10k users defining best practices.
- For a global tech company, directly sold a Business Transformation and OCM engagement for \$2M in revenue. Sold expansion projects leading to an incremental \$4M in revenue.



The nation's largest healthcare staffing company

San Diego, CA

VP, Customer Operations (Credentialing) - Directed 150 team members contributing to record revenue

03/15 - 12/15

Digital Transformation & Software Development

- Provided executive sponsorship to a \$50M multi-year business and IT Transformation project implementing Sales Cloud Salesforce.com (SFDC) and Peoplesoft.
- Led both business and technical teams in an Agile approach to developing a mobile app for clinicians.
- Trained 4 Business Process Analysts (BPAs) to create Level 5 process maps, ROI analysis, time and motion studies, change management, and project management.

Contract Administration & Performance Management

- Generated an incremental \$17M by implementing the largest customer electronic medical records (EMR) project in AMN's history.
- Turned around a very dissatisfied \$78M customer by delivering World Class Customer Service. This prestigious east coast customer is one of AMN's Top 5 accounts. Used LEAN re-establish trust with the customer.
- Re-organized the team to a customer Single Point of Contact (SPOC) model, shifting from an internal business unit focus to a customer centric focus. This required an intense change management campaign.



A Fortune 125 medical device company with \$25B in revenue

Orange County, CA

VP, Customer Technical Service

2014 - 02/15

Oversaw the functions of Customer Technical Support, Service Revenue Operations, and Spare Parts Logistics. The entire organization comprised of 250 team members and 6 locations across the US.

P&L Management

- Managed a \$170M P&L. Reduced overtime by 90% and travel by 60%. Delayed hiring to reduce labor.
- Increased Service Revenue of \$150M by 3% YOY by reducing free of charge giveaways, billing overrides and by increasing service contract retention, warranty conversion, and spare parts pricing.

Talent Management

- Managed the entire Talent Management Lifecycle including recruitment, hiring, retention, performance management, succession planning, and disciplinary actions for 250 teammates.
- Introduced a Talent Management and Career Paths Model that encourages team members to explore opportunities within the company, increasing employee engagement and tenure with the company.

World Class Customer service

- Led Beckman Coulter to the #1 Ranking in 2014 Overall Phone Support from the #3 Ranking (IMV ServiceTrak)
- Winner of 2014 President's Kaizen Competition against 8 other teams. Improved phone fix rate 5% in one month by automating processes and improving proactive Remote Service capabilities.
- Collaborated with R&D, regulatory affairs, and quality assurance on FDA Audits and documenting protocols.

Director, Customer Technical Call Centers

2013 - 2014

Led the North American Customer Technical Support team of nearly 200 employees or 8 direct reports across 5 call centers. Also, led the Reception team and Quality/Training initiatives.

Transformational Leadership

- Transformed a traditional functional organization into a Matrix organization which required an intense change management campaign. Cross-trained 25% of the team on new products.
- Conducted a custom employee engagement survey to better understand the needs of our call center agents.

Operational Excellence/Lean Methodology

- Focused the team in breaking a Beckman Coulter record on the metric of Live Answer Rate. For the first time in Beckman Coulter's history, the team answered 88% of incoming phone calls live within 30 seconds.
- Utilized the Problem Solving Process involving Pareto root cause analysis on obstacles hindering the Live Answer Rate and Phone Fix Rate. In 2013, achieved Phone Fix Rate goal every month and annual Live Rate of 86%.

Director, Sales Operations

2010 to 2012

Transformational Leadership

- Transformed a dysfunctional team into a high-performing team by utilizing a number of leadership and organizational development tools. Resolved deeply embedded conflict within the team. Positively changed the culture and values of the team.
- On a team of 10 people, re-allocated 2 resources to more value-added responsibilities such as Analytics. Redeployed resources based on strengths, skill-sets and career goals. Responsible for leading executive IC steering committee.

Process Improvement

- Re-established trust by driving a cross-functional team of 10 people in implementing IC system. Parallel tested 5 months of compensation data resulting in a 99.9% accuracy rate instilling confidence in the sales force.
- Reduced the number of resources required to process IC from 8 to 5 resources.
- Reduced the cycle time required to process IC by 33% from 15 business days to 10 business days.

EMULEX A hardware manufacturer of computer network connectivity products

Orange County, CA

Senior Director, Global Sales Operations

2008 - 2010

- Responsible for annual operating plan, revenue forecast, incentive compensation, budgets and CRM.
- Forecasted global revenue by sales channel and presented results to C-level executives in weekly revenue calls. Improved line of sight forecast visibility to 5 quarters and implemented process improvements reducing forecast cycles and sales people involvement. Gained consensus on 2010 Forecasting Policies across C-level executives.
- Led sales and product management organizations through the 2010 Annual Operating Plan (AOP) on \$400M in revenue. This served as the springboard to define quotas by sales employee, by account, and by product.
- Directed a cross-functional team of 15 people from HR, Finance, Sales, and Sales Ops in implementing an Oracle IC system. This project failed to launch four times before my involvement as project manager.
- Led executive workshops gathering requirements for a Sales Cloud Salesforce.com implementation defining sales stages, forecasting and opportunity management.

EXTREME LEARNING A mid-sized business providing afterschool educational programs

Orange County, CA


Vice-President, Customer Operations

2007 - 2008

Directed a field-based organization of 600 customer facing employees across 75 locations to service 10,000 customers. Responsible for financial performance, operations, customer service, recruiting, and training. Member of the executive team.

Transformational Leadership

- Hired, trained and mobilized over 500 employees in six months to service 300 schools stretching from Sacramento to Calexico, CA. Unified this geographically dispersed organization through values setting, goal setting, and team-building events. Drove tactical plans through organization to achieve budget goals.
- Created executive dashboards in SFDC utilized by the CEO on a weekly basis to evaluate the health of the business. Optimized key revenue metrics such as attendance and income potential.
- Managed P&L for six regions representing 90% of the company's revenue to achieve financial objectives by deploying appropriate human and capital resources. Conducted Operational Reviews. Increased revenue by 16%.
- Continuously met with executives at customer locations to assess our Customer service levels and our ability to deliver on our promises. Responded promptly to customer complaints by implementing solutions within 3 weeks.

 **QUEST SOFTWARE** Cloud management, security, workforce mobility software maker
Senior Director, Global Sales Operations

Orange County, CA
 2002 - 2007

Executive Facilitation

- Directly recruited, hired, motivated and developed a team of 15 resources. Inspired and restructured team to maximum output resulting in net annual savings of \$100k. Salvaged the Siebel application and ran its operations globally across 23 countries, 800 users, and 12 departments
- Facilitated Steering Committee, managed conflict, and gained consensus across 12 business areas including Sales, Marketing, Professional Services, Business Development, Accounting, and Legal.
- Developed and championed CRM Vision, Strategy and Roadmap by collaborating with C-level executives, leading global workshops and employing CRM best practices.

Opportunity Management and Forecasting

- Designed global sales forecasting solution from scratch, automating the aggregation of financial projections. Provided ability to analyze forecast by geography, product, hierarchy and employee.
- Responsible for accurate and timely submission and roll-up of worldwide forecast from 600 sales individuals on a weekly basis.

 **PRICEWATERHOUSECOOPERS CONSULTING** A Big 4 Accounting and Advisory Firm
Principal Consultant, CRM Practice

Orange County, CA
 1998 - 2002

Headed significant leadership roles on 9 projects all involving change management, business process improvement and CRM implementations. As Project Manager, managed 24 resources. Recognized with Above & Beyond Award; less than 1% receive this prestigious award.

Sample Projects:

- Led the Change Strategy, Process, and Data Conversion teams for the full cycle of an SFA implementation at a leading specialty pharmaceutical company. Developed the communication strategy and schedule. Developed Level 3 Current & Future State process maps and matrices that led to a Behavioral Change Document. Performed Stakeholder Analysis. Facilitated Software Selection. Assisted in the development of training materials, vendor scripts, reference questionnaire, scorecard, analysis, and business case.
- Spearheaded the Change Strategy, Process, Training and Test teams for the full life cycle of a Siebel-Vitria-Portal Implementation for a leading DSL Provider. Directly managed 8 resources. As Assistant Project Manager, coordinated the efforts of 24 resources. Coordinated across client departments and development teams to resolve issues and finalize requirements. Developed the communication strategy and schedule. Developed Future State Process Maps.
- Spearheaded global rapid full-cycle implementation of Siebel SFA for the leading maker of monitoring software in record speed. The 14 week project improved processes range from prospect to order management including full integration to Oracle.

 **KPMG CONSULTING** A Big 4 Accounting and Advisory Firm
Senior Consultant, CRM Practice

Orange County, CA
 1997 - 1998

- Conducted client work sessions translating functional requirements. Flowcharted current and future state processes. Created training material.

 **Coca-Cola Enterprises** A marketer, producer and distributor of Coca-Cola products
Manager, Finance – Field Service & Field Sales

Los Angeles, CA
 1995 - 1997

Managed 6 direct reports or a finance organization of 18 in the fastest growing, most profitable region of Coca-Cola.

Change Management

- Initiated an innovative paperless process saving \$300k with a payback of 3.2 years. Reduced a 4 week process to 24 hours. Captured more revenue and increased Customer service with an earlier delivery date.

EDUCATION

M.B.A., UCLA ANDERSON SCHOOL OF MANAGEMENT, Executive Program (Class President)

- Raised \$110k in funds with 100% class participation, breaking EMBA and Anderson records

B.S., USC MARSHALL SCHOOL OF BUSINESS, (Finance, Marketing, Entrepreneurship)

PROFESSIONAL AFFILIATIONS, COMMUNITY ACTIVITIES & INTERESTS

Board of Directors, UCLA Anderson Alumni Network, 2007 to 2011

Member, USC Marshall Alumni Network, 2003 to present

Activities: volleyball, stand up paddleboarding