
SENIOR EXECUTIVE – PROFILE

Dynamic, results-oriented leader with a strong track record of performance in growing fast-paced organizations. Utilizes keen analysis and insights and team approach to drive organizational improvements and implementation of best practices. Superior interpersonal skills, capable of resolving multiple and complex (sales, human resources, legal, financial, operational) issues and motivating staff to peak performance. Excel in financial analysis, business planning, and establishing policies, processes, and performance monitoring systems in support of continuous improvement.

AREAS OF EXPERTISE

- Strategy, Vision & Mission Planning
- Strategic Planning / P&L Management
- Sales & Marketing Leadership
- Profitability & Cost Analysis
- Programs, Services & Products
- Contract Negotiations & Strategic Alliances
- Finance, Budgeting & Cost Management
- Policy & Procedure Development
- Human Resources Management
- Team Building & Performance Improvement
- Change Management
- Technology Savvy Executive

EXPERIENCE AND ACHIEVEMENTS

Entrepreneur / Business Consultant

2007 - present

As an entrepreneur and a consultant, time is primarily spent on establishing and improving new businesses. These functions are predominantly performed through a platform company formed for that purpose named VISTACO LLC. Projects include the development of the following three organizations:

- *Select Sotheby's International Realty* – Formed in August of 2007 – Real Estate Brokerage representing unique and distinctive properties throughout Upstate NY – Primary role is to develop the business plan, recruit agents, open offices and establish a firm brand presence in the community at large.
- *Terrel Hills Water Company* – Acquired in August of 2007 – Public water utility serving a neighbourhood of 227 homes. Primary role is to modernize the accounting and data management for the company, and to create a higher level quality of service by conducting system improvements and improved communication tools.
- *Hannah's Hope for G.A.N.* – Formed in April of 2008 – Charitable foundation with a primary goal of raising money for the research and development of a cure for Giant Axonal Neuropathy – Primary role is to advise the board on strategic direction related to constituent management and communication tools and to plan / develop fundraising strategies and events.

Core BTS, Inc.

1994-2007

Core BTS, Inc. (a CTI company)

April 2006-February 2007

Managing Director – NY Division

Core BTS, Inc. (Core) is a \$100M technology solutions provider, which is funded in part by Founders Equity from NYC, bank financing and investment capital from the founders of the organization. Core is wholly owned by Convergence Technologies, Inc.(CTI) which was formed as an acquisition corporation for the purposes of identifying top level, profitable, technology solutions providers in the Eastern United States which would be candidates for consolidation. As Managing Director for one of the top branches within the consolidated Core organization, the primary responsibility was to lead the integration to corporate systems while maintaining the strategic direction for the Clifton Park and Long Island Branch locations to focus on growth. These efforts resulted in two fully integrated branches with 2006 financial results of 21% revenue growth and 12% EBITDA growth over 2005. Additional accomplishments and responsibilities included:

- Participated as a member of the CTI (parent company) due diligence team in analysis additional acquisitions.
- Provided leadership to sister companies in understanding how to cross-sell Core services and offerings.
- Participated as a member of the Executive Management Team which includes the top two representatives from each branch office along with the corporate CEO, COO and CFO.
- Managed and approved new hire recruiting process for the Clifton Park and Long Island branch locations. Accountable for 7 direct reports and 62 FTE's across the two branches

- Co-led the Sales team along with the Senior Vice President of the NY Divisions
- Led the integration effort as the Clifton Park and Long Island branches successfully adapted new Finance, Accounting, Payroll, Project Management, Quote Management, CRM and Forecasting tools
- Negotiated leases and managed the office renovation and build-out for both the Clifton Park and Long Island offices.

Open Systems Inc. (a CTI company)

November 2004 - April 2006

Executive Vice President and Officer

Open Systems, Inc. (OSI) was a \$15M technology solutions provider, which is a wholly owned subsidiary of Convergence Technologies, Inc. (CTI). OSI was the first of four acquisitions that CTI would eventually complete from November 2004 through April of 2006. As Executive Vice President for OSI the primary responsibility was to lead the integration to corporate policies while maintaining the strategic direction for the Clifton Park and Long Island locations to focus on growth. These efforts resulted in 2005 financial results of 16% revenue growth and 31% EBITDA growth over 2004. Additional accomplishments and responsibilities included:

- Fulfilled all of the duties of Vice President of Operations of OST in unison with the EVP role.
- Continue as a member of the OST Management Team and elected as an Officer and member of the Open Systems, Inc. Board of Directors.
- Set strategic directions for the company, working with the President and other board members.
- Participated as a member of the CTI (parent company) due diligence team in analysis additional acquisitions.
- Provided leadership and direction for all integration efforts moving the company to the new bank accounts, credit facilities, HR systems, etc. following the completion of the acquisition.
- Provided leadership to sister companies in understanding how to cross-sell OSI services and offerings.
- Participated as a member of the Executive Management Team which includes the top two representatives from each subsidiary along with the CEO and CFO of the parent company.
- Participated and led deal negotiations related to local subsidiary level merger and/or acquisition opportunities.
- Managed and approved new hire recruiting process. Accountable for 5 direct reports and 65 FTE's across two branches.
- Co-led the Sales team along with the President of OSI

Open Systems Technologies, LLC. (private family owned)

July 1994-November 2004

Vice President - Operations

Open Systems Technologies, LLC. (OST) was a \$12M technology solutions provider, which was privately held by the Canastar family. OST was founded in 1991 by Ken Canastar, and I was hired to head up operations in 1994. As Vice President of Operations for OST the primary responsibility was to build all systems, processes, policies, and relationships necessary to support the company's sales and business development goals. While starting in 1994 from scratch, we were successful in building the company to \$12M per annum 2004 results, yielding approx. \$1M in normalized EBITDA. These efforts resulted in the acquisition by CTI in November of 2004, which the majority of my efforts where focused on negotiating and completing within the 2004 fiscal year. Additional accomplishments and responsibilities included:

- Responsible for all aspects of business management with regards to Operations department and the Technical Services department. (This includes Finance, Accounting, Technical Support, and Technical Implementation)
- Produced steady Revenue and EBITDA growth year over year.
- Developed and managed compensation plans and programs, and set accountability / measurement practices
- Managed and approved the development of the annual fiscal budgets.
- Developed business plans, researched and supported initiatives relative to mergers and acquisition opportunities for the company.
- Worked as the OST liaison to fulfil the documentation requirements and due diligence process to complete the sale of Open Systems Technologies, LLC to Convergence Technologies, Inc. in November of 2004.
- Managed accounting system and accounting procedures / policies. Managed payables, receivables, general ledger, reconciliation's, etc.
- Responsible for procurement of company assets and all project fulfilment hardware and software including vendor negotiations and credit line negotiations.
- Managed the development of all company communication programs including web site, press, marketing collateral, etc.
- Developed quotation and budget designs / procedures to provide a professional, consistent, and accurate presentation of information to our clients.
- Managed vendor and distributor relationships, including responsibility for all purchasing, shipping and receiving.

- Experience with the management and support of internal network and systems (LAN), web site, and all data communications (WAN).
- Participated in the development of client network equipment designs, server and software specifications, schematics, and specifications.

EDUCATION

Siena College – Bachelor of Science, Marketing and Management
Loudonville, NY

1994

CERTIFICATION

New York State Licensed Real Estate Sales Person (April 2007)
New York State Licensed Real Estate Broker (September 2007) Unique ID #: 31BU1151251

Core is a Cisco Gold Partner, and through the years, it was necessary to achieve and maintain certification levels to retain this designation in the marketplace. This list of exams demonstrates my ability to understand and become certified in complex technical fields.

Cisco IPCC Express for Account Managers (March 2005)
Cisco Wireless LAN Sales Specialist (May 2004)
Cisco Service Expert Program (March 2004)
Cisco Sales Expert 1.0 (March 2004)
Cisco Product Solutions Essentials IPT Exam (April 2003)
Cisco IPT Project Management Milestones Exam (April 2003)
Cisco IP Telephony Solutions Exam (April 2003)
Cisco Sales Expert Selling AVVID Architecture (June 2001)
Cisco Sales Expert Enterprise Business Solutions (August 2001)

TECHNICAL KNOWLEDGE

Network and Voice Hardware Vendor Competency - Cisco Systems, Alcatel, Enterasys Networks, Cabletron System, 3Com, Bay Networks, Digital.

Systems Hardware Vendor Competency – Compaq, IBM, Digital, Hewlett Packard, NEC, Tandberg

Microsoft Application Competency - Great Plains, Sharepoint, SQL, Windows NT Server, Exchange, Internet Information Server, Proxy Server, NT Workstation, Office Suite, Windows CE, SmartMobile, Publishe, Project, Outlook, Outlook Express, Schedule +; FrontPage, Internet Explorer, NetMeeting, Team Manager, Visio Professional

Veritas Application Competency - Backup Exec Single Server and Enterprise Server

Symantec Application Competency - Norton AntiVirus for Servers and Workstations, ACT, PC Anywhere.

Intuit Application Competency - QuickBooks, Quicken, Quicken Deluxe, TurboTax.

AutoDesk Application Competency - AutoCAD LT

Adobe Application Competency - Acrobat Exchange; Acrobat Reader; PageMaker, InDesign, Photoshop, Illustrator, Creative Suite

Macromedia Application Competency - Dreamweaver, Fireworks, Extension Manager, Flash.

Sage Application Competency - Peachtree Complete Accounting
