

International success applying business intelligence and system automation in product development, operations, and marketing to launch, scale, and drive success of high-growth start-up and early stage enterprises

INTERNATIONAL BUSINESS OPERATIONS EXECUTIVE START-UP | EARLY STAGE | HIGH-GROWTH | TURNAROUNDS

System & Process Automation ❖ Business Intelligence ❖ Operational Scaling ❖ Product Management

Strategic Planning • Business Analytics • Market & Customer Segmentation/Analysis • VC Funding: Angel | Seed | A Round
Strategic Partnerships • Product Development • Customer Acquisition & Retention • Supply Chain • Logistics & Fulfillment
Operational Excellence • Automated CRM & Marketing • C-Suite & Investor Reporting • Cost Reduction

Entrepreneurial-spirited, technology-oriented operations executive with proven track record building and scaling operations to drive growth, deliver investor ROI, and position companies for acquisition. Expert in leveraging automation and business intelligence to inform decision making and operational, marketing, and product strategy development. Consistently develop and execute strategies that provide increased efficiency, contribution margin per customer, and customer retention at minimum cost. Readily architect right data sets to analyze specific areas of businesses in diverse domestic and international settings, and build metrics-focused teams and comprehensive, highly automated infrastructures to implement scalable solutions.

- Conceived/built Pacatio company that pioneered digital wallet to ~3,000 users in Latin America.
- Launched and grew Aviesta ecommerce site to Mexico's 3rd largest, with two million users before its acquisition in 2013.
- Captured one of 10 coveted spots for Pacatio out of 120 applicants to *QC FinTech* business accelerator class, Spring 2015.
- Played key role in facilitating start-up, second, and third round financing for three business start-up/early stage companies.
- Provided winning strategies to resolve tough issues and turnaround operations for multiple U.S. and overseas companies.

PROFESSIONAL EXPERIENCE

AGUA PARTNERS, Charlotte, North Carolina

Startup studio focused on launching consumer facing web and mobile apps.

Managing Partner / Product Lead

September 2015 - present

Launched startup studio for providing entrepreneurs with web and mobile product management, data architecture, engineering support, scalable operations, and consumer marketing for launching their MVP and proving product-market fit.

Successfully launched five startups since 2015Q4:

- Managed team of engineers, UI/UX designers, online community managers responsible for successfully launching and marketing portfolio companies.
- Worked with each founding team on product management – from initial wireframes to successfully measuring data after launch.
- Established operating infrastructure, policies and procedures, and business plan for positioning companies to raise capital.

Some portfolio companies include: [2ULaundry](#), [Kalllea](#), [Kunfer](#), [nomADic Technologies](#), [Cathedral Leasing](#)

PACATIO, Santa Monica, California

Startup offering digital wallet application with intelligent marketing solutions to small-to-mid-sized retailers in Panama.

Founder & CEO

2013 – August 2015

Conceived and launched leading-edge technology business designed to bring power of online data gathering, segmenting, and marketing tools to offline brick and mortar world. Spearheaded development of "Digital Wallet" providing retailers with high volume consumer data and in-depth analytical capability to build marketing programs and drive revenue. Directed all aspects of firm from inception, including P&L/operations management, budgeting and expense reduction, customer acquisition, revenue enhancement, angel investment, strategic partnerships, product development, and staff/executive team leadership.

Took business from concept to 15-employee operation processing approximately \$50,000 per month in transactions for merchants:

- Recruited, developed, and led executive team including CTO and CFO, management team including Creative Director and Business Development, Marketing, and Community Managers, as well as engineering staff.
- Established operating infrastructure, policies and procedures, and business plan.
- Directed development and successful launch of pioneering “Digital Wallet” technology.
- Led customer focus groups and demonstration forums that informed product refinement and development/deployment of four versions during 6-month beta program.
- Conducted market analysis and executed marketing campaign resulting in onboarding of 10 merchant clients to platform and ~3,000 registered users (customers) during beta phase.
- Achieved acceptance of Pacatio into *QC FinTech* Spring 2015 class—one of only 10 out of 120 global applicants for high-profile accelerator/incubator program in Charlotte, North Carolina.
- Introduced product improvements that reduced customer acquisition cost to \$0.56 and increased average order value over 30-fold from \$1.17 to \$37.49 within 4 months of launch.

3K+ Users
❖
50% MoM Merchant Growth
❖
QC FinTech Incubator Selectee
❖
Successful Exit Strategy

Positioned company for sale and negotiated terms of acquisition currently underway by Panamanian bank.

AVIESTA, Santa Monica, California

Subscription-based ecommerce website offering deep discounts on apparel, jewelry, beauty, and accessories to consumers in Mexico.

Co-Founder | COO | CTO

2010 – 2013

Based on Hispanic market opportunities revealed in work with Blue Casa Communications, co-developed concept and business plan to deliver best-in-class ecommerce services to “banked” population in Mexico. Holding P&L and budgetary responsibility for \$225K/month operation with \$500K/month revenue target and 35% margin target, directed team of 30 including Directors of Creative and Operations, Managers of Customer Service, Social Media, Marketing, Business Intelligence, and Business Development, and 10 engineers. Scope included website architecture, scalability, and security, supply chain management, revenue assurance, customer service, logistics and fulfillment, business intelligence/company-wide reporting, and cost containment.

Built business to \$1.5M and rank as third largest ecommerce site in Mexico, with two million users in just 6 months:

- Raised ~\$5M in angel/early stage private investor capital, and initiated talks with bankers for B round as company grew.
- Designed and managed implementation of technology infrastructure for robust and complex multi-currency ecommerce website that scaled to handle two million active monthly users.
- Increased gross margins from 28% to 35% while decreasing delivery times and cost of goods with move of fulfillment operations to warehouses in U.S. and Mexico and shift to direct procurement from China versus from U.S. brokers.
- Executed marketing plan utilizing partnership with top celebrity in Mexico that provided high visibility and drove massive site traffic and user growth.
- Dealt with complex customs issues to enable Texas/Mexico border warehouse to behave much like “UPS” in Mexico, with warehouse integrated into Aviesta’s CRM to enable highly efficient picking, packing, and shipping.
- Instituted highly responsive customer service function starting with one representative on online chat handling multiple customers simultaneously, and then building out full customer service team with online chat and phone service.
- Directed team of 10 development engineers in major upgrade of systems from Magento to Python.

“Caleb is a dedicated professional, committed 24/7 to problem solving”
❖
D. Kelly, Board of Directors

Made decision based on market limitations due to low “Percent Banked” as well as major economic downturn in Mexico to offer business to retailers interested in expanding their brick and mortar businesses online; sold in 2013.

BLUE CASA COMMUNICATIONS, Santa Barbara, California

Home phone service and internet service provider (ISP) serving households in California, with emphasis on Hispanic market.

Director of Business Intelligence | Chief Data Architect

2006 – 2010

Brought into this start-up with only 20 employees as Senior Financial Analyst/ Business Analyst, advanced rapidly as business grew to ~150 employees and \$50M to Director of Business Intelligence and IT and finally to Chief Data Systems/Data Architect reporting directly to CEO. Directed teams of up to 20 in-house and offshore software engineers, software architects, project managers, data warehouse engineers, and business intelligence/financial analysts.

Ensured timely development and scaling of enterprise systems, business analyses/reporting, and IT infrastructure to support rapid growth, customer service excellence, and generation of approximately one million pieces of mail per day:

- Created automated customer segmentation model and analytics enabling 5% bad debt reduction, 20% increase in delinquent account collection, optimal messaging type/frequency, and reduction in churn from ~15% to as low as 6%.
- Reduced operating expenses and vendor management costs 25% through enterprise-wide automated systems for back office functions including CRM, COGS reconciliation, end-user billing audits, and real-time credit scoring.
- Informed executive decision making with company-wide dashboard reporting, process optimization and automation, and critical company analytics.
- Enabled daily processing of millions of customer transactions as well as “deep dive” customer analysis by architecting and leading development of sophisticated data warehouse.
- Speeded and simplified billing with automated system featuring dynamic image library and parsing data for 50 customer segments, driving revenue through ability to market and upsell products while reducing customer service/call center calls.

Played key role in company’s successful scaling, ability to attract three rounds of financing, and 2009 sale back to VC firm.

FIDELITY CORPORATION, Athens, Greece

Project Engineer | Associate Engineer

2006, 2002 – 2003

EM CAPITAL, INC., Orinda, California

Senior Associate | Financial Analyst

2003 – 2006

In series of management consulting assignments with these companies, provided financial analysis, business analysis, startup, and turnaround advisory services to diverse corporations in U.S. and Greece. Gained extensive experience with restructuring of insolvent companies, bankruptcy emergence, cost reduction initiatives, operating model development/overhaul, operational scaling to improve margins, distribution/retail channel optimization, marketing programs, vendor partnerships, cash flow optimization, and overseas sourcing. Worked across industries including shipping, airline, publishing, and government ministries.

Highlights include:

- Created successful strategy and plan to turnaround Greek shipping company nearing insolvency/losing market share, by improving distribution/retail channels and marketing ROI, building vendor partnerships, expanding routes and fleet.
- Addressed cash flow and cost issues causing San Francisco publisher to file for bankruptcy, identifying Chinese supplier that reduced costs ~60%, increased margins dramatically, and improved timing and logistics.
- Consulted with Greece’s Ministry of Transportation to create financial models, project plans, and market analyses for implementation of renewable energy alternatives.
- Prepared business plans for Greek Ministries of Economy and Finance.
- Outsourced divisions of various insolvent businesses to both domestic and international markets, resulting in cost reductions of up to 30%.
- Developed ecommerce websites and implemented online marketing campaigns for various clients, increasing overall annual revenues 12%.

EDUCATION

CALIFORNIA POLYTECHNIC STATE UNIVERSITY, San Luis Obispo, California

Bachelor of Science in Electrical Engineering, *Emphasis in Digital Communications* – June 2002

TECHNICAL BACKGROUND

Programming: SQL 2008/2014, C, C++, C#, JAVA, PHP, MDX, Python, MySQL
Software: MS SQL Reporting Services, Visual Studio, MS SQL Server, Linux

LANGUAGES

English (Native) ❖ Spanish (Conversant) ❖ Greek (Conversant)