

Up-To-Date Curriculum Vitae

Curriculum Vitae (As at Spring 2021)

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Profile Highlights

- More than 20 years operational experience in forming and growing start-up companies, as well as, directing sales and marketing teams in mid-sized to large organizations
- Proven business and consulting experience in delivering sales results, recruiting, coaching & motivating sales teams, planning & implementing marketing programs, leading CRM initiatives, negotiating partnerships, managing budgets and meeting both quarterly sales targets and yearly profitability targets.
- More than 15 years of experience teaching introductory and advanced level sales and marketing courses at the diploma, degree, masters, EMBA and executive development levels.
- More than 9 years academic and program leadership roles at both the college and university levels including the past 3 years as the Director, Smith Graduate Diploma in Business

Education

- M.B.A. The Richard Ivey School of Business (1995).
- A.S.A. Associate of the Society of Actuaries (1993).
- B.Sc. Actuarial Science (Honors), The University of Western Ontario (1990).

Teaching Experience

The J.R. Smith School of Business at Queen's University (2007 – present)

Lecturer (Continuing Adjunct), Marketing Department

Over the past 15 years I have taught courses in the Commerce, MIB, MEI, GDB, MBA, EMBA and Executive Education Programs. In 2020 I created the first course for the edX platform (called Enterprise Selling) and co-created 2 additional courses as part of the first Professional Certificate offered by Queen's/Smith on edX. At Smith, courses taught include the following:

COMM132 Marketing II
COMM231 Introduction to Marketing
COMM302 Marketing and Launching New Ventures (new Winter 2018)
COMM305 Introduction to Entrepreneurship
COMM405 Management of New Enterprise
COMM434 Professional Selling and Sales Management
MBUS867 Strategic Sales Management and Operations
MBAS831 Marketing Fundamentals
MBAS837 Sales Management
MGBL834 Global Sales Management
GDB831 Marketing Principles
MMEI831 Marketing and Selling in a New Venture
COMM504 Faculty and Acting Director for Queen's Business Consulting
Course Executive Education Sales Management

St. Lawrence College, School of Business (2005 - 2017)

Full-time Faculty, Marketing Program

Over 12 years I consistently taught full-time courses in both the diploma and degree programs. Courses include the following areas of specialty:

- Introductory Marketing
- Marketing Management (Degree Program) Special
- Topics in Marketing
- Marketing Analytics and CRM
- Professional Selling
- Sales Account Management
- Sales Management

Professional Experience

- Director, Smith Graduate Diploma in Business (2018 – present)
 - Working in a cross-functional team including faculty, PGPS, Marketing, Finance and the Smith Leadership I was responsible for program design and implementation, managing the student recruitment and selection process and overseeing the operations of the program.
 - In our first year we make key program additions and grew enrolment from mid-20's to high-40's. During our 2nd and 3rd years we completely revised the program to be delivered live remote as a consequence of COVID while still ensuring robust enrolment.
- Entrepreneur in Residence (2017), Invest Ottawa
 - Develop and implemented a specialized program to offer dedicated 1:1 sales performance improvement to a target list of high performing startup companies within the Invest Ottawa portfolio
- Co-Founder, AllRoads, Inc. (2009 - 2016)
 - Co-Founded this Kingston-based company which has grown to more than 15 full-time employees and clients throughout Canada and the USA.
- Coordinator, Marketing Programs, St. Lawrence College (2009 – 2017)
 - As Coordinator for the past 8+ years my responsibility was the overall academic direction of the program consisting of all aspects of curriculum design and development, customized academic planning and faculty team management. During that period, I was responsible for completing 2 program reviews (1 in progress) and implementing comprehensive improvements to the curriculum, student experience and engagement with community.
- Advisory Board Member, MaxSold (formerly YouBidLocal, 2009 – 2011)
 - Assisted owners and management team with both the initial sales strategy and planning around how to rapidly drive growth in the business.
- Board Member, Pathogen Detection Systems (2004)
 - Board member for this PARTEQ spin-off company which was subsequently sold to Veolia.
- Founder, Marketing and Sales Consultant, OPTIAC (formerly Jamox) Solutions (2003 – present)
 - Operating as both an investor in startups and a sales and marketing consultant to industry. There have been many engagements over the years including the following:
 - Regularly consulted for sales strategy and implementation advice by mid to small

sized corporations across Eastern Ontario.

- Designed and implemented a sales training program for a Calgary-based IoT (internet of things) company (2021)
 - Designed and developed a go-to-market program including digital implementation for a venture-backed food ingredient company out of the US (2019-2020)
 - Completed a comprehensive sales audit for a \$3Million Kingston-based manufacturer and assisted in the implementation of a number of changes including a sales force automation system, a lead generation system and customized professional sales training.
 - Analyzed the inside sales division of a major Canadian telecommunications company and recommended a number of changes including revisions to current sales onboarding, a customized training program, and new performance metrics.
 - Piloted the development of a new sales channel for detailing to physicians for the Canadian division of a major branded pharmaceutical company.
 - Led a CRM initiative to automate core customer service functions and create a customer self-service website that would enable an ERP Company's partners and customers to securely access internal/operational data over the Internet.
 - Transformed a Montreal-based startup from a technology-focused company to an Internet Applications Development firm and assisted in their subsequent sale.
- Vice President, Sales and Marketing, ESPONSIVE (2001 – 2003)
 - Joined this Kingston-based company in 2001 as Vice-President of Sales & Marketing; Responsible for recruiting a sales team and driving first revenue of a hosted search solution; within 9 months recruited a team of 5 sales people and generated new clients including IBM and MDS Sciex.
- General Manager, CPlane (2000 – 2001)
 - Setup CPlane's (San Francisco-based networking software company) product development operations in Canada.
 - Recruited team of engineers and established two R&D offices (Montreal & Ottawa).
 - Managed annual operating budget of \$1Million+.
 - Provided account management support to business development initiatives out of the USA.
 - Successfully led a sales force automation initiative to enable the geographically dispersed account executive team to coordinate and manage sales and account activities.
- General Manager, DNet (1998 – 2000)
 - Established the Canadian Operations for this San-Francisco-based startup.
 - Co-recruited the product development team in Montreal and San Francisco locations.
 - Responsible for the day-to-day product development operations.
- Marketing Manager, Clinidata (1995 – 1998)
 - Responsible for managing the sales and marketing functions for the physician division.
 - Launched two major software products over two years and grew the business to thousands of subscribing physicians.
 - Negotiated long-term sales licensing deals with national physician associations to promote our services to their members.
 - Key member of the team that successfully negotiated the exit strategy via a sale to a larger health informatics company.
- Business Analyst (Actuarial Assistant), Confederation Life Insurance Company (1990 – 1993)
 - Primary responsibility for preparing the quarterly business analysis and reserve determinations for two investment funds representing a portfolio value of \$400Million.
 - Completed the post-graduate courses to obtain my professional designation as an Associate of the Society of Actuaries.

Recent Industry Workshops, Articles, Presentations and Briefings

- Convened a committee of sales professionals to discuss challenges in recruiting young people into the sales profession (Jan 2018)
- Chaired advisory committee on the development of a sales boot camp to take place in Commerce Program (August 2017)
- Initiated and or Published the following content on Smith Insights between Sept and Dec 2019

Articles

- The Shape of Sales to Come, Article written by Wayne MacPhail based on advisory board meeting of senior sales professionals
- Consulting Edge: How Sales Management Training is a Difference Maker, Article written with Meredith Dault based on multiple interviews with consultants

Interviews

- How to Set the Table for Enterprise Sales Success
 - Interview with Shannon Katschilo
- Willy Loman Doesn't Live Here Anymore
 - Interview with Mark Girvan, Chief Commercial Officer, Freshbooks
- High Growth Marketing
 - Interview with Andrew Dubowec, Vice President Strategy, League
- Nudging Sales into the AI Revolution
 - Interview with Steve Woods, Founder and CTO, Nudge
- Case development as part of coursework and directly in partnership with Living Case
 - Have written multiple mini-cases (1 page) on marketing, sales and sales management
 - Have co-written with Living Case Unit multiple cases
 - Have written and co-written cases for competitions including in various program and for the Queen's Sales Association
- Venture for Canada (2017-present); Half-Day Workshop on demand generation in startups
- Queen's Executive Education (Full Day Workshop on sales management in practice)
- QICSI (2016 - present); Half-Day Workshop on sales in startup companies
- Interviewed for the Globe and Mail Article (Oct 2020; quoted in article How a Montreal Chatbot Provider is Using CRM to Drive Revenue)
- Interviewed for Financial Post Article (Sept 2013; quoted in article Personal Branding a Permanent Reality for Today's MBA Grads)
- Marketing Metrics (Feb 2013; Keynote address for Corus Entertainment Workshop on Winning in Your Business)
- Personal Branding (May 2012; Guest briefing for incoming MBA class orientation)
- Gaining Customers Via Social Media (Oct. 2011; Full Day Workshop; Center for Corporate Learning and Performance Improvement)
- Rethinking Your Reputation in a Digital World (July 2009; Whitepaper co-written with Dan Trottier, PhD)

Applied Research and Professional Development Interests

- Perceptions of a career in sales among undergraduate students (Winter 2018 in collaboration with Professor Laurence Ashworth)
- Collaborated with Professor Ali Etemad (School of Engineering and Applied Sciences) on the development of an AI tool to assist students in real-time analysis of communication skills in a buyer-seller environment.
- Leveraging personal online branding (focus on SME businesses) to drive high margin sales
- The future of professional selling in a digital world
- The future of sales education (role of teaching) in a digital world
- Local Food and Sales Distribution Channels

Awards and Recognition

- 2019 and 2020 Commerce Society Teaching Excellence Award Winner
- Nominated for teaching award in commerce program (2017, 2018)
- Sales Coach of Team which won second place in the National Collegiate Sales Competition (2013)
- Nominated for the Frank Knox Award for Excellence in Teaching (Queen's University Wide 2012)
- Student course evaluation results (at the Smith School of Business) have consistently ranked well above departmental means.
- Sales and Marketing Coach for St. Lawrence College OCMC Team which has consistently placed at the top in the annual Ontario Colleges Marketing Competition
- Selected as Teacher of the Year in the School of Business (St Lawrence College, 2005 -2007)
- Founded the Richard Ivey MBA Internal Marketing Case Competition which, due to its success and demonstrated value, was added to the first-year curriculum (1995).
- Recipient of the University of Western Ontario Award for Excellence in Intramural Athletics (1994).
- Founder & First President, Toastmasters International Chapter at Confederation Life Insurance Company (1992).
- Recipient of the 1990 National Achievement Award for Excellence in Amateur Sport in Canada.
- Member of the 1990 Canadian National Ball Hockey Champions.
- Valedictorian, High School Graduating Class (1986)

Professional Affiliations & Continuing Development

- Member of the Canadian Professional Sales Association
- Member of Digital Analytics Association
- Past Member of the American Society for Training and Development
- Leveraging current research in the field of sales methodologies and artificial intelligence to redesign sales and sales management course modules related to sales process, discovery and gaining commitment.
- As part of a self-directed life-long learning plan, am an avid reader of trade publications, regularly conduct sales interviews, survey professionals and assess relevancy of marketing and sales curriculum against industry best practices and emerging theories/research in the field.

Service and Community Involvement

- Hockey Coach, GK Ice Wolves, KAMHA & Church Athletic League (2012 –present)
- Board Member of the Kingston & District Sports Hall of Fame (2008 - 2009)
- Co-Chair, 2012 RBC Cup Bid Committee (2009)
- Acting Secretary, KingstonFirst Committee (2008)
- Co-Chair, Kraft Hockeyville Committee (Kingston, 2006)
- Marketing Advisor to Board, KEDCO (2005 – 2006)
- Various academic committee work including Major Award Selections, Student Admissions Screening, Faculty Peer Review and Selection