

**Management consultant focusing on business success through growth strategies, capitalization, financial management, and business strategy.**

► **Project Experience: Growth Strategy**

Development of a plan for US growth, focusing on Eastern seaboard, establishment of US sales hub in Reston VA, with staffing, office, marketing. *Results: 75% of business resulting from US sales.*

Strategic marketing/sales plan to build European network from initial contact. *Results: Expanded from initial sale to flow of sales from 10 organizations in 3 European centres.*

Board strategic plan to expand energy sector company through new product development, and expanded sales through organic and partnership strategies. *Results: New products to market, Sales growth doubled in five years.*

Board growth plan toward US/UK expansion, through partnership and new sales channels, and focus on high-potential product lines. *Results: Sales increase and significant profit improvement.*

Program expansion plan, using three strategies of focused marketing, sales enhancement, process improvement, and expanded product offering. *Results: Sales increase by 350% to \$5 million in 3 year period.*

► **Project Experience: Financing/Capitalization**

Stage two business plan for PEI based startup, with pro formas to support a \$3 million second round of venture capital investment: *Results: Venture Capital Firm decided to decline second round.*

Financing strategy and funding partners secured to support Leveraged Management Buyout, with initial \$2.45 million of non-dilutive capital. *Results: Successful LMBO, with capitalization from BDC, Royal Bank, ACOA, and the Province of New Brunswick.*

Operating capital plan needed to support startup sales growth, with pro formas, and business plan. *Result: \$500,000 infusion to support growth.*

Strategic Investment to support major market expansion, tied to strategic partnership arrangement, with major Maritime telecom company. *Results: \$5 million arrangement, in three tranches.*

For national creative media firm based in NB, board plan and effort to raise growth capital for strategic initiatives. *Results: \$100,000 raised through the NBITS program.*

## ► Project Experience: Digital Adoption

Strategy to convert to eRevenue stream for NB \$1 million corporation with thousands of annual transactions. *Results: Successful implementation, converting cheques/cash revenue to over 75% through eTransfers, debit machine, and automated withdrawal. Operational savings, lower bank fees, and growth in revenue base.*

Backoffice digital modernization project for Maritime firm in the creative industry, part of board/advisory strategic plan. *Results: Modernized systems and network provided improved work-flow, and remote work capabilities.*

Sales process modernization for Atlantic Canadian organization, from telephone/email based customer orders to streamlined web-based order system with ecommerce back-end. *Results: Increased sales volume, and staff re-directed to higher value tasks.*

## ► Project Experience: Business Planning

Channel partnerships plan for high-tech firm looking to multiply sales beyond one significant partnership. *Results: Expanded from one core partner to four anchor partners generating 50% year-over-year growth.*

Chinese market expansion plan, a core strategy in a business expansion plan aimed toward external investors. *Results: Investors eventually declined the requested investment.*

Proposal and action plan to consolidate online programs into a significant operating unit with focused marketing and sales. *Results: The creation of UNB Online, with financial results that doubled projections.*

## ► Career Timeline

1990 - current *Business advisory consulting services*  
2005 – 2022 *Founder/Director of CETL at University of New Brunswick*  
2006 – 2009 *Founder/Director of UNB Online*  
1998 – 2005 *Owner/President of LearnStream Inc.*  
1993 – 1998 *President of FirstClass Systems PDC*

## ► Education

MBA *University of Calgary*  
MEd *Simon Fraser University*  
BSc *University of Toronto*  
BEd *University of Toronto*

## ► Contact Details

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