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JEFF WHITE

STRATEGY & OPERATIONS | AWARD-WINNING PAYMENTS EXPERT

Driven and adaptable Chief Executive Officer, Chief Revenue Officer, and Former Chief Technology Officer with transferable experiences in finance, payments, corporate development, sales, and technology management. Award-winning specialist in charge of a company's revenue streams. Leverages knowledge of the roles both sales and marketing play in driving growth with ultimate accountability in aligning all revenue-generating departments and building strategic partnerships. Consistent top-tier revenue performance within both private and public equity companies. Proven ability **to** increase territory sales over 500% in the first year.

Founder of three award-winning software companies with a data-driven foundation of education (SaaS Development, Digital Strategy, Executive Coaching, and overall expansion in technology, sales, and financial planning). Leads decision-making over revenue, tax compliance, financial reporting, treasury and cash management, financial operations, and team training development.

- **Combines technical expertise with strong business expertise** and operational knowledge to continuously monitor and assess strategic initiatives and evaluate priorities to best serve our clients, compliance requirements, and stakeholders.
- **Founder and CEO of award-winning technology companies that brought in \$4.5M of recurring revenue.** Exceeded Q1 2015 goal by 30%. **Awarded Innovative Product Award** by Insightful Accountant. **Awarded CIO of the Year.**
- **Leads, hires, recruits, and trains top-talent by building and leading** high-performance teams, establishing onboarding strategies, and prioritizing team engagement. Promotes open communication for a positive culture.
- **Spearheads cross-department initiatives to improve collaboration and reduce redundancy.** Develops cash-planning and forecasting capabilities for the company with expertise on compliance, areas for improvement, and innovative strategy.
- **Proficient in key software platforms such as** Microsoft Office Suite (Word, Excel, Outlook, and PowerPoint), QuickBooks, Microsoft Dynamics, NetSuite, SAP, Intacct, Expensify, Oracle, Hubspot, Salesforce, etc. Rapid learner of new programs.

CORE PROFICIENCIES

Financial Management
Market Intelligence
Customer Acquisition
Product Line Expansion
Payroll | AR | AP | Invoicing

GAAP Federal Compliance
Client Relations | Client Advocacy
Networking & Negotiations
Risk Management & Mitigation
Global Sales Management

Payment Strategy & Planning
SaaS Development & Marketing
Staff Training & Development
Onboarding/Training Programs
Team Leadership & Mentorship

PROFESSIONAL EXPERIENCE

CLEARSPEND

Charlotte, NC

2021 – Present

Chief Executive Officer

- ClearSpend provides payment card control software to 32 banks, across 19 countries, with 13 million cards enrolled.

PROFITSOLV

Knoxville, TN

2020 - 2021

Vice President of Payments

- Created and deployed a complete payments strategy for the holding company of the Legal Brands vertical for both Greater Sum Ventures and Lightyear Capital.
- Developed a consolidated integration payments strategy to standardize payments integrations on a go-forward basis and provide a consistent boarding, processing, and reporting platform for the portfolio companies. Audited and recouped valuable inaccurate billings from major payment platforms which secured leverage for contractual renegotiations of existing payment contracts.
- Grew payments division revenue by over \$2M within six months.
 - Facilitated audits during acquisitions of new and existing portfolios which earned over \$10k in new monthly revenue. Reached 20% payment consumption ratios within Rocket Matter and Mango Billing.
- Facilitated the negotiation of key payment vendor contracts.
 - Evaluated current payments platform setup and renegotiated terms among eight portfolio companies. Secured new vendor relationships that ensured favorable contractual terms for portability and profitability with the anticipation of the future investment recap strategy.
- Created and released new payments integration stack.
 - Drove the technical vision and managed the consolidated of integration options for portfolios by creating a reporting middleware platform.
 - Triaged all the transaction systems into one common API with a front-end reporting platform utilizing .NET Core framework. Platform facilitated over \$10M in monthly volume of transactions within the first 30 days of release.
- Drove major acquisitions to market with payments in record time.
 - Created a white-labeled payments strategy for both Tabs3 & Cosmolex and drove a complete go to market strategy for both companies.
 - Ensured that both platforms were fully live with the new platform within thirty days of acquiring the organizations. This included development, certification, marketing, sales, and channel strategies being created and successfully deployed within record time.
- Noteworthy Accomplishment:
 - Audited and recouped over \$50,000 in inaccurate billings from First Data within the first 30 days.
 - Secured favorable terms for payment facilitator model with ProPay and FIS.
 - Grew monthly residuals to over \$105,000 within six months.
 - Brought major acquisition to market with payments in less than 30 days.

ROCKET MATTER & LEXCHARGE

Charlotte, NC

2018 - 2020

Chief Revenue Officer | Vice President of Payments

- Multi-disciplinary leader for Rocket Matter, a legal cloud-based case management & billing software company conceptualized through machine-learning. Chief Revenue Officer responsible for influence multiple departments, including the complete payments strategy, finance, new business sales, digital marketing, and partner strategy.
- Manages two global sales teams between Rocket Matter and LexCharge.

- Supervises operations that drive business growth across all customer segments and profiles. Shares accountability with the marketing function for improving the individual customer experience/strategy.
 - Monitors the revenue pipeline and leads/creates sustainable growth.
- Led negotiations in Rocket Matter being acquired by Greater Sum Ventures.
 - Subsequently promoted to VP of Payments for the Holding Company (known as ProfitSolv, a brand owned by Lightyear Capital & Greater Sum Ventures).
- Created and managed the entire payments offering.
 - Helped with the acquisition of LexCharge, a payment processor focused on the legal market. Took over as GM for LexCharge and managed the payments team on a go forward basis.
- Develops and implements marketing strategies to continually increase revenue-generating activities. Exceeds aggressive monthly KPIs and Sales Quotas for product value and product quantity.
- Commands high standards from employees as brand stewards to meet customer demand and elevate client satisfaction. Coordinates ongoing projects between the V.P. office of Operations, H.R., and marketing department.
- Participates actively in strategic and business unit planning to develop reasonable and thorough revenue projections for annual budgets and multi-year projections.
- Expert understanding of SaaS-based cross-channel marketing and the programmatic space. Ensures that all internal audits are flawless and within compliance of GAAP standards and regulations while formulating revisions to programs.
- Deep knowledge of cross-channel marketing and native advertising.
 - Supervises local and national ad campaigns (digital and print media). Organized promotions and ideated content with the digital marketing and sales for cohesion.
- Recognized for strong negotiation skills regarding all employee contracts, vendor outsourcing, discounts, etc.
 - Oversees all Channel/Partner Development - adding new sales channels and third-party resellers/partners.
- Secured NASPO and FedRAMP Ready status with key partnerships such as SHI, CDW & Insight.
- Secured the companies largest marques customers such as the entire State of Arkansas Department of Health and Humans Services, Rogers Townsend and more.
- Built Channel Sales and Customer Success strategies which assisted with the users expansion within the existing log base along with a deeper professional services offering.

AGILITY PAYMENTS

2017 - Present

Charlotte, NC

CEO | Co-Founder

- Agility Payments is a company partnered with CardConnect that offers integration for secure payment processing for companies like General Electric, Adobe Creative Suite, and NexTech.
- Responsible for managing sales and business development processes and performing a significant role in planning that resulted in increased corporate revenue in a multi-state territory.
- Recognized and promoted for strong ability to improve processes and meet with clients in a way that measurably drove revenue.
- Consulted cross-functional, peak-performing teams to champion business development initiatives and delegate tasks that control costs and inspire customized solutions to promotional challenges.
- Co-Founder that assisted in inception and development of initial business planning including brand positioning, marketing strategy, sales campaigns, content strategy, sales techniques, and digital marketing plans.
- Built strategic relationships with external partners and established repeat business, contract negotiations, and brand loyalty that benefited all parties involved.
- Implemented completely automated drip campaigning, sales, and marketing platform through the use of Salesforce Enterprise, Pardot, Outreach.io, Quip and Slack.
- Motivated employees to achieve optimal efficiency, productivity, and loyalty to the organization using effective performance management, goal setting, incentives, conflict intervention, disciplinary action, and empowerment.

- Mentored and trained employees to cover operational requirements in multi-state territories. Championed brand stewards that successfully administer an interchange income model that established credibility, removed ambiguity, and increased sales productivity for a drastic upturn in overall revenue.
- Noteworthy Accomplishments:
 - Increased territory sales over 500% in first full year over the previous 3 years by collaborating with First Data and TSYS relationship managers on strategic initiatives.
 - Developed and implemented a new territory coverage strategy that led to an increase of \$2M+ in sales revenue.
 - Consistently developed a prospect pipeline of 2X to 3X annual quota.
 - Executed innovative lead generation techniques.

TOUCHSUITE
Boca Raton, FL

2015 - 2017

Chief Technology Officer

- Served as an executive in charge of worldwide information systems and technology. Provided enterprise leadership and direction in the management and operation of cloud-based SaaS information systems, software applications, and global technology.
- Responsible for achieving and growing total revenue, including capital, disposable, and extended service sales in assigned U.S. territory of the technology division.
- Drove innovation and velocity in product management, engineering, and daily sales operations.
- Managed SaaS product offering delivering over \$55 million in annual revenue with the significant cost of goods cost reduction and EBITDA increase.
- Re-architected business-critical, revenue-generating SaaS product to protect and grow a \$4 million business unit.
- Established high stability, performance, and scalability in a previously failing environment.
- Led strategic development and delivery of enterprise systems, including corporate administration, human resources, finance, operational fulfillment, and business intelligence.
- Noteworthy Accomplishments:
 - Reduced operating budget by 62% while transforming the I.T. function to realize greater value at the corporate level and service level improvements in the business units.
 - Developed multi-tenant, payment processing gateway platform hosted in Amazon's Web Services cloud yielding 220% increase in annual on-line units and revenue.

EARLY EXPERIENCE

PENSMORE SOFTWARE
Charlotte, NC

2011 - 2014

Founder & CEO

- Disrupted Intuit monopoly in payments. Utilizing proprietary software secured in Driven CRM sale, created first competitive payments integration into QuickBooks Point of Sale, Online and Desktop software platforms.
- Created first omni-channel solution in SMB market. Created a unified tokenization gateway that communicated with the Datacap NetEPay platform and transacted to over 12 major processors.
- Exceeded YOY revenue by 300%. Closed large deals with marquee enterprise clients such as Vantiv, First Data, & EVO & Mercury Payment Systems.
- Implemented operational system and risk guidelines, established strict qualification standards, and developed other processes which reduced sales cycle by 32%. Surpassed Q3 and Q4 goals (2014) by 25%, bringing in \$4.5M of recurring revenue.
- Successfully transacted over \$216 million annually in payments. Managed and successfully transitioned exit of business to American Bancard, dba TouchSuite in December 2014.

DRIVEN CRM

Charlotte, NC

2007 - 2011

Founder & CEO

- Crafted overall account sales strategy and coordinated activities of sales executives to achieve revenue goals; marshaled internal resources to develop plans that helped clients achieve objectives.
 - Increased revenue by an average of 31% per year by "word of mouth" referrals.
 - Increased declining margins from a low of 23% to 65% and increased profits by adding new profitable customers and cross-selling more products to existing customers. Managed key relationships and partnerships with Intuit, Sage, Microsoft and other major billion-dollar organizations.
 - Grew sales by over 40% by developing new business in Canada and the U.K. in depressed economic conditions.
 - Developed short and long-term sales strategies to gain market share/penetration with regional managers, branch managers and account executives to uncover new sales opportunities, develop [organic] sales, and increase revenue.
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EDUCATION**MBA (In Progress)**

University of Illinois | Geis College of Business

AWARDS

- Innovative Product Award – Insightful Accountant
- CPA Product of the Year Award – CPA Advisor
- CIO of the Year Award – South Florida Small Business Journal