



2025

THE TALENT BOOK

Build Your Best Team With Canopy



CANOPY
ADVISORY GROUP

LETTER FROM

GRIFFEN O'SHAUGHNESSY

FOUNDER AND CEO, CANOPY ADVISORY GROUP

WELCOME TO THE 2025 TALENT BOOK FROM CANOPY ADVISORY GROUP

The Talent Book is your resource to discover the very best fractional and consulting experts available across a wide range of disciplines, including finance, business strategy, marketing, nonprofit, leadership development, public relations, and human resources. Beyond those featured here, Canopy offers our clients access to a community of more than 200 stringently vetted, experienced and skilled expert advisors.

Whether you're an enterprise company looking to fill a temporary hole in your leadership team, a startup grinding toward growth, or any organization in-between, there are many scenarios where bringing on fractional support is a better choice than hiring a full-time employee. Canopy will connect you with the right fractional experts to help solve your problems, onboard them seamlessly into your organization, and help you make every fractional project a resounding success.

At Canopy, we're committed to helping you build your best team. If you're interested in learning more, reach out to me directly at griffen@canopyadvisory.com or fill out and submit a form on our website.



WHY OUR CLIENTS

CHOOSE CANOPY

The world of work has changed, and blended teams are the future for organizations of all sizes and types. Canopy helps leaders quickly integrate executive-level fractional experts into their organizations and teams, driving better outcomes and positioning the business for success today and tomorrow.



Best-in-Class Vetting

Our clients know that every Canopy Expert Advisor must pass through our best-in-class vetting process, giving them complete confidence in their chosen experts.



Staffing Flexibility

Because of the strength and size of the Canopy community, it's as easy for clients to build full blended teams as it is to manage single projects.



Unmatched Agility

Our clients can count on Canopy working at the speed of their business, with most Expert Advisors on board and ready for impact in 1 week.



Proven Results

Fractional engagements must move the needle to be successful, and 99% of our clients have returned for a second engagement.

HOW THE CANOPY PROCESS WORKS



Whether you're considering your first fractional project or you've brought on outside consultants and experts in the past, we've found that following a concise process for supporting fractional engagements is a key driver of success. Here's the process we work through with all of our clients to ensure your project is set up for the best possible outcomes:

1. ALIGN ON YOUR TALENT NEEDS AND TIMING

We work together to understand the fractional expert help you need in the short and longer term.



3. SET PROJECT DOWNLOADS AND ONBOARD EXPERTS

Once proposals have been accepted, we begin the process of completing deep downloads with our experts on the project and your organization.



2. INTERVIEW AND SELECT THE RIGHT EXPERTS FOR YOUR PROJECT(S)

Next, we'll hand-pick the most relevant experts and set up sessions where you and your team can meet and interview as many options as you like.



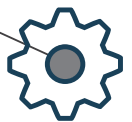
4. PROJECTS KICK OFF AND MOVE FORWARD

In addition to expert advisor support, our internal team remains engaged to ensure that all elements of the project are exceeding your expectations.



5. POST-PROJECT REVIEW AND NEXT STEPS

We gather your thoughts, information and analysis from the experts involved, and internal team notes to identify what went well and areas for opportunity.



If you're interested in hearing from our current and past clients on what it's like to work with us and where they've found value in partnering with Canopy for their fractional projects, check out our Success Stories page on canopyadvisory.com.



THE TALENT BOOK

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MEET THE **CANOPY TEAM**

THE RIGHT TALENT FOR YOUR BUSINESS



GRIFFEN O'SHAUGHNESSY

FOUNDER AND CEO

Griffen is an attorney and CPA with more than twenty years of professional experience. She worked in Holland & Hart's mergers and acquisitions practice until the fall of 2009 when she started Canopy. Griffen also worked in the audit group of Arthur Andersen before attending law school at American University.



MARY CLARE PITTINOS

DIRECTOR OF OPERATIONS

Mary Clare provides a broad range of skills including data asset management, process automation and development, and marketing communications. Her ability to apply real world experience to everyday opportunities and obstacles allows the Canopy team focus on providing an unparalleled level of service to its consultants and clients.



JAMIE FITZGERALD

DIRECTOR OF STRATEGIC PARTNERSHIPS

Jamie is a business development, growth and sales professional with experience in the technology, nonprofit and insurance industries. She has a proven track record of identifying and soliciting new and expanded business. She excels in identifying areas for growth and creating and executing sales strategies.



SERENA ROBINSON

DIRECTOR OF MARKETING AND EVENTS

Serena is marketing and events manager at Canopy and joined the team in 2018. She is a New York City native with over twelve years of events, marketing and public relations experience - from marketing and events at financial firms, to start-ups, art and design companies and non-profit organizations.



VIOLETA MADERA

FINANCE MANAGER

Violeta is a bilingual finance expert with extensive knowledge in various online platforms and a track record of customer success. She is a highly motivated and dedicated Business Management graduate who provides optimum customer service and is a proven fast learner.

MEET

BUSINESS STRATEGY

THE RIGHT TALENT FOR YOUR BUSINESS





CHRISTINE S.

BUSINESS STRATEGY

Christine is a proven performance and outcomes-driven executive, board member, and entrepreneur with nearly two decades of experience with Fortune 500 companies in the healthcare space.

Christine specializes in turning ideas into viable businesses, finding product/market fit, and driving organizations to growth through better patient outcomes and innovative approaches to operational efficiency. Most recently, she served as a founding employee and co-CEO of Eon Health, where she played an integral role in building a best-in-class healthcare technology business from the ground up. Previous to Eon Health, Christine held key leadership roles at Stryker, Medtronic and Baxter.

Leveraging a broad and diverse skill set, Christine can positively impact every area of a business, from leadership to culture to product delivery to marketing and sales and beyond. She earned a BS in advertising and political science from the University of Colorado, Boulder.

MEET BUSINESS STRATEGY

THE RIGHT TALENT FOR YOUR BUSINESS



ALLISON F.

BUSINESS STRATEGY

Allison brings 20 years of leadership experience across diverse industries, with a steadfast commitment to driving impactful change. To support clients, she leverages her experience with the board of directors for We Don't Waste and leadership roles with Destination Imagination. Allison earned her MBA from Georgetown University and holds certifications in change management, Six Sigma White Belt and Scrum.



MATTHEW T.

BUSINESS STRATEGY

Matt provides executive level consulting and advising to support small and medium-sized businesses in the professional services and construction industries. His 25 years of experience include roles with Arthur Andersen, Prudential Financial, Ayuda Companies and Baseline Engineering. Matt is a CPA and earned his degree in business administration and accounting from LaSalle University.



REMY S.

BUSINESS STRATEGY

Remy partners with small to mid-sized organizations, serving as an operational strategist and thought partner to help them achieve revenue, people-focused and other operational goals. Her influential leadership has been recognized with awards from Folio Magazine and the Denver Business Journal. Remy holds a graduate certificate in nonprofit management from Harvard University.

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BUSINESS STRATEGY



SCOTT S.

BUSINESS STRATEGY

Scott specializes in fostering revenue-generating partnerships, establishing strong relationships with C-suite leaders and building, training, and managing high-performance teams. His more than 20 years of experience in digital media and advertising technology include positions at Adswerve, Google, Microsoft and Mapquest. Scott earned a BA in economics from Bucknell University.



CHARBEL D.

BUSINESS STRATEGY

Charbel seamlessly integrates operational insights with strategic planning, helping clients identify opportunities, develop strategies and deliver sustainable growth. He brings more than a decade of experience, including roles with KPMG, Tierra Firma, Punicus Consulting and Ampyx Cyber. Charbel earned his MS in strategic management and change from the University of Denver.



RANDY C.

BUSINESS STRATEGY

Randy assists clients in the tech, transportation and manufacturing industries with leveraging the use of CRM, analytics, data and data science to improve operational efficiency. In a career spanning more than 25 years, he has been trusted by clients including Salesforce.com, PwC, Penske Truck Leasing and Twilio. Randy earned his MBA from the University of Notre Dame.

MEET

FINANCE AND ACCOUNTING

THE RIGHT TALENT FOR YOUR BUSINESS





ROBYN L.

FINANCE

Robyn helps clients overcome financial and business challenges through external and internal audit strategy support, regulatory services and management consulting.

She has more than 15 years of public accounting and consulting experience, working with a range of smaller high-growth companies and Fortune 500 companies. Most recently, Robyn worked with KPMG in New York and Los Angeles. Her consulting experience includes a broad array of strategic projects spanning finance, accounting and strategy.

Robyn is intently focused on helping her clients solve problems and meet their objectives. In addition to her professional services experience, Robyn was a middle school math teacher as part of the Teach For America Corps in Chicago.

MEET FINANCE AND ACCOUNTING

THE RIGHT TALENT FOR YOUR BUSINESS



CRAIG I.

FINANCE

Craig is a proven executive with expertise in financial planning, strategy and execution. He uses his more than two decades of FP&A experience across tech and other industries to develop detailed financial forecasts and establish key performance indicators to enhance profitability for his clients. Craig holds a BS in business administration from the University of Richmond.



JAMES B.

FINANCE

James has a proven track record of driving profitability and financial efficiency, increasing EBITDA, optimizing supply chains, and supporting substantial revenue growth across a diverse range of industries. He has successfully provided strategic financial guidance to help numerous companies achieve long-term financial stability and growth. He earned his MBA from the Olin Business School.



KEITH D.

FINANCE

Keith is an innovative and strategic thinker with more than 25 years of experience tackling tough business challenges. His specialties include strategy and analysis, investment banking, financial management, financial and analytical modeling, forecasting, operational effectiveness, and leadership advisory. Keith holds an MBA in strategy and finance from the Kelley Business School.

GET TO KNOW YOUR COMMUNITY OF **FRACTIONAL EXPERTS**

FINANCE AND ACCOUNTING



JOSEPH M.

FINANCE

Joe provides financial consulting and strategic advice to support companies with growth and help establish and maintain financial stability. He brings more than 20 years of conducting investment research and analysis in public and private capital markets. He is a CFA charterholder and earned his MS in finance from the Daniels College of Business.



JENNIFER A.

FINANCE

Jennifer assists companies with investor, management, and board communications, SEC compliance, strategy, and day-to-day finance and accounting leadership. Her experience includes working with companies in manufacturing, financial services, sustainability, consumer goods, and more. Jennifer is a CPA, Investor Relations Charter holder, and Fundamentals of Sustainability Accounting credential holder.



ROBYN L.

FINANCE

Robyn helps clients overcome financial and business challenges through external and internal audit strategy support, regulatory services and management consulting. She has more than 15 years of public accounting and consulting experience, working with a range of smaller high-growth companies and Fortune 500 companies, including KPMG. Robyn earned her MS in accounting from the University of Colorado at Boulder.

MEET

HUMAN RESOURCES

THE RIGHT TALENT FOR YOUR BUSINESS





TINA B.

HUMAN RESOURCES

Tina is a human resources executive with more than 20 years of experience in developing and leading world-class HR programs and operations. Known for her strategic leadership, Tina excels in creating high-performance cultures and driving operational excellence.

Tin's expertise spans the HR spectrum, from designing wellness strategies to launching management training to implementing DEI programs. During her tenure with First Onsite Property Restoration, Tina developed a talent acquisition strategy resulting in a significant increase in quality hires and substantial savings in agency fees. Her work in harmonizing benefit plans also created considerable savings, and her onboarding program improved employee satisfaction.

In her career, Tina has worked with both Fortune 500 companies and high-growth enterprises and is extremely well-equipped to collaborate with private investment firms. She holds the Senior Professional in Human Resources certification from HRCI and earned a graduate degree from Stanford University.

MEET HUMAN RESOURCES

THE RIGHT TALENT FOR YOUR BUSINESS



LORI L.

HUMAN RESOURCES

Lori is a human resources professional specializing in recruiting and team building. She leverages 20 years of diverse experience across industries including consumer packaged goods, tech startups, retail and nonprofits. Lori earned her BS in business administration from North Park University and holds the Senior Professional in Human Resources certification.



ERIC W.

HUMAN RESOURCES

Eric's passion is in developing and delivering progressive people strategies to drive high levels of employee engagement, which result in measurable business value and transformational capabilities. Over a career spanning three decades, he has held global HR leadership and consulting positions for companies including Pepsi-Cola, Andersen/Accenture, Dell, DISH Network, and National CineMedia.



DEREK J.

HUMAN RESOURCES

The employee experience frameworks Derek implements for his clients help ensure that talent can be utilized at the right time and place, creating a culture of personal and professional growth. His 15 years of experience include acquisition, engagement, development, management and retention and roles at Google, Prologis and Better.com. Derek is also the co-organizer for Denver Startup Week.

GET TO KNOW YOUR COMMUNITY OF **FRACTIONAL EXPERTS**

HUMAN RESOURCES



AMY P.

HUMAN RESOURCES

Amy enjoys mentoring HR professionals and offering leaders alternative ways to think about issues and solving problems. She has more than 12 years of experience as a human resources leader and strategist across commercial real estate, construction, and advertising/media. Amy holds an MBA and a Senior Professional Human Resources certificate (active).



ANGIE B.

HUMAN RESOURCES

Angie is a legal operations and human resources executive with more than 20 years of experience across a wide range of industries. She assists clients with building legal procedures and training staff on how to interface with the legal process, as well as building a human resources function. Angie earned her JD from the Sturm College of Law.



BRITTANY S.

HUMAN RESOURCES

Brittany helps her clients build purposeful and meaningful HR strategies and programs that disrupt the status quo, promote professional development and foster organizational growth through people. Her experience includes leadership roles with WeWork, Sakara Life and Sunbit. Brittany is a Myers-Briggs Type Indicator Certified Practitioner and earned her BA in psychology from Hunter College of CUNY.

MEET

INFORMATION TECHNOLOGY

THE RIGHT TALENT FOR YOUR BUSINESS



MICHELLE W.

INFORMATION TECHNOLOGY

Michelle supports clients with services in marketing, operations and data privacy, including the creation of strategic roadmaps, governance programs and technology partner assessment and implementation.

Michelle excels at helping owners and leaders create marketing and business transformation programs that focus on customer journey building, market and competitive research, pricing strategies, product development, omnichannel marketing, data-driven experiences, effectively leveraging marketing dollars, and assessing and enhancing the use of MarTech and AdTech. In a career spanning more than 18 years, she has leveraged her global business expertise in various leadership positions, including work on major brands such as DISH, Abbvie, DraftKings, AT&T, Big 5 Sporting Goods, Novo Nordisk and Chili's. Her ability to align people, process and technology at the convergence of marketing and data allows her to help clients solve complex business problems.

Michelle is also the founder of Lightfilled, a charity focused on repairing relationships with families through mediation. She earned a marketing degree from Drake University and a JD from the University of Wyoming.

GET TO KNOW YOUR COMMUNITY OF **FRACTIONAL EXPERTS**

INFORMATION TECHNOLOGY



SEAN H.

INFORMATION TECHNOLOGY

Sean is a Business-of-Technology leader with more than 20 years of experience, offering clients strategic information technology support, including assistance with business continuity, disaster recovery and crisis management. His experience includes technology executive roles at SaaS company GasItUp/ChargeltUp, Hewlett Packard, Inc. and Charles Schwab. Sean earned his MBA from Bellevue University.



LUCAS R.

INFORMATION TECHNOLOGY

Lucas offers clients services in the areas of web development, project management and UI/UX design. His 15 years of experience include work across various industries and companies, including Sony PlayStation. Lucas earned his BS in interdisciplinary computing in the arts from the University of California San Diego.



JOSH S.

INFORMATION TECHNOLOGY

Josh helps clients strengthen their security posture, including creating workable Secure SDLCs, incident response, risk mitigation, information security, and more. Over a -15year career, he has worked with organizations at all lifecycle stages. Josh holds Xperience Developer & Marketer and Kontent (Cloud) Developer & Business certifications from Kentico.

MEET
LEADERSHIP

THE RIGHT TALENT FOR YOUR BUSINESS





BENNIE F.

LEADERSHIP

Leveraging his journey from undrafted free agent to Super Bowl champion, Bennie supports executives, leaders and organizations to step into their infinite potential through the power of his MVP leadership method.

After signing with the Denver Broncos as an undrafted free agent in 2014, Bennie went on to help the team win Super Bowl 50. Overall, he played for eight years in the National Football League, suiting up as a wide receiver for the Broncos, Giants and Saints.

Bennie may be best remembered for his touchdown late in Super Bowl 50; he also hauled in the final pass of soon-to-be Hall of Famer Peyton Manning.

MEET LEADERSHIP

THE RIGHT TALENT FOR YOUR BUSINESS



SHANNA W.

LEADERSHIP

Shanna coaches leaders and individuals to transcend their limits while reinvigorating team cultures. She brings 23 years of experience as a successful financial services executive at Charles Schwab, Janus Henderson Investors and Arthur Andersen. Shanna earned her Executive MBA from the University of Arizona and is a certified Gallup Strengths Coach.



ELIZABETH C.

LEADERSHIP

Liz is a proven leadership coach and developer of outstanding leaders and teams. In a career spanning more than 25 years, she has served as a leader, program owner and developer of people across startups, nonprofits, government and multi-national corporations. Liz holds the Certified Professional Co-Active Coach (CPCC) from the Co-Active Training Institute.



RUTHERFORD P.

LEADERSHIP

Rutherford is a highly accomplished senior executive specializing in creating great leaders through personalized coaching, dynamic group training, and impactful keynote speeches. He brings more than three decades of experience across companies including Genzyme/Sanofi, Novartis and Bristol-Myers Squibb. Rutherford earned his BS from Arizona State University.

GET TO KNOW YOUR COMMUNITY OF FRACTIONAL EXPERTS

LEADERSHIP



JOSEPH Z.

LEADERSHIP

Joseph is an Executional Strategist, leveraging more than 100 frameworks to help clients craft both a clear, credible plan to win and implement accountable follow-through. His diverse experience includes roles with Oracle, Experian and Custora. Joseph is a Certified Executive Coach and holds a Level 6 Pragmatic Product Management and Marketing certification.



ANDY C.

LEADERSHIP

Andy is a proven operations, finance and business strategy executive with more than 20 years of experience transforming and scaling successful technology businesses. Today, he champions and challenges executives to identify and achieve their dreams in and beyond their professional lives. After earning his undergraduate degree and MBA from Stanford, Andy served in leadership roles at v companies including Datalogix and Oracle.



CYNTHIA F.

LEADERSHIP

Cynthia helps privately funded tech companies align, collaborate and scale at a rapid pace, guiding leadership toward healthy, sustainable growth. She has more than 25 years of experience developing exceptional leaders and high-performing teams, including roles with the ABILITYNetwork, The Schwann Food Company, Optum and US Bank. Cynthia earned her M.Ed in Human Resource Development from the University of Minnesota.

MEET
MARKETING

THE RIGHT TALENT FOR YOUR BUSINESS





RACHAEL S.

MARKETING

Marketing leader and branding expert Rachael has a proven track record in B2B marketing, helping brands stand up and stand out for accelerated growth.

Rachael has a knack for building strategic marketing frameworks that align with business growth objectives and is an invaluable resource for growth-stage companies looking to strengthen their brand and market position. Her experience ranges from aligning marketing strategies with sales to generating demand and guiding brands through the complexities of growth, capital raises, reputational risks, hiring sprees and turnarounds. In her career, Rachel has successfully led transformative initiatives at Project Canary, LongPath Technologies, Alibaba.com, Zayo, Manna Tree, Axon, Risilience and BeZero.

Rachel's vibrant and direct approach, deep market insights and creativity make her an ideal partner for organizations seeking a consultant or fractional CMO.

MEET MARKETING

THE RIGHT TALENT FOR YOUR BUSINESS



DAN M.

MARKETING

Dan works with business leaders to strengthen the foundations of their marketing and communications programs, helping them save money and drive revenue. He brings a blend of strategic and tactical skill gained from an 18-year corporate career in finance, tech and nonprofit organizations. Dan earned his MBA in marketing from the Daniels College of Business.



MATT L.

MARKETING

Matt leverages more than two decades of marketing, communications, business development, business strategy, operations and partnership experience to help mission-driven organizations achieve exponential impact. His career includes roles with Quantified Ventures, GWU and Hill+Knowlton Strategies. Matt earned his MBA in marketing from The George Washington University.



KATE W.

MARKETING

Kate assists clients with developing, directing and executing successful, visionary marketing plans. She brings insights from a career of more than 25 years, spanning diverse industries including finance, film, fashion, non-profits, nanotechnology, events, cannabis, motorsports, and real estate. Kate earned her BA in communication from the University of Colorado.

GET TO KNOW YOUR COMMUNITY OF **FRACTIONAL EXPERTS**

MARKETING



KIRSTEN M.

MARKETING

Kirsten brings brands to life through critical insights, strategic thinking, and strong client partnerships. Her more than 20 years of experience spans advertising agencies, associations and nonprofits. Kirsten earned an advertising certificate from the Association for Advanced Advertising Studies and holds multiple Google Partner certifications.



SARA Y.

MARKETING

Sara helps clients refine their brand voice, create content marketing strategies that drive demand, and cultivate user communities on social media. Her experience includes leading transformative initiatives at dozens of high-growth SaaS startups, as well as consulting projects with Rice University, NYU and H-E-B. Sara earned her journalism degree from Texas A&M University.



JASON S. S.

MARKETING

Jason is passionate about helping entrepreneurs and small businesses across the country unlock their marketing potential. His diverse experience includes leading strategic projects, PR, events, operations and marketing initiatives for organizations including PwC, Ace Handyman Services and Andrea Schumacher Interiors. Jason earned his BSBA in marketing from the Kelley School of Business.

MEET

NON PROFIT

THE RIGHT TALENT FOR YOUR BUSINESS





MARCIA D.

NON PROFIT

Marcia is a sought-after expert in nonprofit culture and leadership, collaborating with mission-driven organizations throughout Colorado to reduce costly turnover, stress and burnout. Her Culture CARESTM framework, a data-driven approach that helps organizations foster a healthy, empowering and inclusive culture, helps clients significantly improve staff trust and engagement.

In 2007, Marcia established the MyLifeLine Cancer Foundation with a vision to transform the cancer experience through community and connection. In 2017, Marcia merged MyLifeLine with the global Cancer Support Community to provide an even greater positive impact for patients and their families. Due to her groundbreaking work in the community, she has received the John Hickenlooper Unsung Hero Award, The Denver Channel's Everyday Hero Award and the Outstanding Leader in Healthcare Award.

Marcia is also a frequent speaker at Colorado Nonprofit Association events. She earned her degree in organizational psychology and business management from San Diego State University.

MEET NON PROFIT

THE RIGHT TALENT FOR YOUR BUSINESS



RACHEL K.

NON PROFIT

Rachel partners with executive leaders at nonprofit organizations to increase positive impact, diversify revenue streams and strengthen internal capacity. She specializes in the social safety net and financial mobility, social drivers of health and food and nutrition security. Rachel earned her degree in international affairs and public health from The George Washington University.



LISA M.

NON PROFIT

Lisa helps nonprofit and social impact organizations build and implement effective communications, marketing, and PR strategies that create measurable impact. She leverages experience across industries including education, healthcare, small business services and small government entities. Lisa holds an Executive Certificate in sports philanthropy from The George Washington University.



LAUREN S.

NON PROFIT

Lauren is a strategic leader helping CEOs and their leadership teams set strategy, build operational systems and prioritize initiatives. She has extensive experience across a range of industries, with a strong focus on advising nonprofit, education sector, and startup clients. Lauren earned her Master of Science in teaching from Fordham University.

GET TO KNOW YOUR COMMUNITY OF **FRACTIONAL EXPERTS**

NON PROFIT



AMY S.

NON PROFIT

Amy focuses on nonprofit strategic planning, organizational process improvement and change management for foundations, school districts, nonprofits and corporations. Her clients include Children's Hospital Colorado, the Colorado Health Foundation and Live Well Colorado. She founded Get Smart Schools and co-founded the Denver School of Science and Technology. Amy earned an MBA from the J.J. Kellogg Graduate School of Management.



ALISON M.

NON PROFIT

Alison brings creative and innovative vision to nonprofit management, strategic planning, arts and culture and community engagement. In her +15 year career, she has overseen 8\$ million in successful capital and donor campaigns, built nonprofit boards from the ground up, and worked on major branded content campaigns around the country. Alison earned her bachelor's degree from the University of Southern California.



KERRI D.

NON PROFIT

Kerri brings more than 20 years of consulting, local and international social sector experience guiding, supporting and empowering diverse stakeholders to develop and achieve shared goals. Her specialties include training and facilitation, governance, strategic planning, conflict resolution and grant writing. Kerri earned a master's degree in peace and conflict studies from UPEACE and was awarded the Rotary Ambassadorial Scholarship.

MEET
OPERATIONS

THE RIGHT TALENT FOR YOUR BUSINESS





ANDY S.

OPERATIONS

Andy is an award-winning leader, operator and global brand builder with more than two decades of proven expertise in driving organizational success and operational excellence.

Andy began his career in digital marketing technology working in varied roles across business development, digital strategy and product management with Fortune 500 companies including Sprint Nextel, Colgate-Palmolive and Microsoft. He then joined a Boulder-based firm that would eventually be purchased by multiple time Agency of the Year winner Crispin Porter Bogusky (CP+B), where he worked with clients like Microsoft, Best Buy and American Express and contributed to projects ranging from Super Bowl commercials to the global digital “I’m a PC” campaign.

His diverse experience also includes serving as CMO of Crocs and COO of a licensing firm and a Colorado cannabis company. A Denver Business Journal 40 Under 40 recipient, Andy earned a BA in communications and political science from the University of North Dakota.

MEET OPERATIONS

THE RIGHT TALENT FOR YOUR BUSINESS



SHAYNA M.

OPERATIONS

Shayna supports clients seeking transformative outcomes with strategic planning, process design, operational excellence and personnel leadership. She has more than 16 years of experience in education and nonprofit administration, including leadership roles with Hopebound and Teach for America. Shayna earned master's degrees in education and educational leadership from the University of Hawaii.



EMILY O.

OPERATIONS

Emily is an innovative problem solver, analytical thinker, and efficient executor. A seasoned professional in business strategy, corporate finance, and operations, Emily has a breadth of experience working across nearly all business verticals. Currently, as CEO & Founder of Guardian Biosciences LLC, Emily has experience in building businesses from the ground up and knows what it takes to get things done.



ERIK S.

OPERATIONS

Erik specializes in working closely with CEOs and boards to integrate operations processes and transform visionary ideas into cohesive and measurable execution plans. He has more than 20 years of experience growing entrepreneurial companies in the energy, engineering and finance sectors. Erik earned a BS in architectural engineering from the University of Colorado, Boulder.

GET TO KNOW YOUR COMMUNITY OF **FRACTIONAL EXPERTS**

OPERATIONS



MICHELLE R.

OPERATIONS

Michelle helps clients shape and execute operational performance in complex environments, aligning strategic goals with actionable initiatives that drive measurable results. She brings more than 20 years of experience in business, technology consulting and operations, including roles with Accenture and RevGen Partners. Michelle earned a BS in business administration and marketing from the University of Colorado, Boulder.



CYNTHIA M.

OPERATIONS

Cynthia partners with established companies to optimize business development and marketing efforts, ensuring alignment with growth objectives and competitive market positioning. Her more than 25 years of experience includes roles with CBRE, SLAM Collaborative and IA Interior Architects. Cynthia holds the Master of Corporate Real Estate designation from CoreNet Global and earned her BA from the University of Kansas.



SCOTT M.

OPERATIONS

As a Green Beret in the U.S. Army and consultant for McKinsey & Company, Scott has worked within some of the highest-performing organizations in the world. He is passionate about applying the leadership, strategy, and problem-solving lessons he learned along the way to help leaders in organizations navigate the multifaceted challenges they face every day. Scott earned his MBA from Harvard Business School.

MEET SALES

THE RIGHT TALENT FOR YOUR BUSINESS



DAVID Z.

SALES

For more than 30 years, David has helped business leaders transform their companies and achieve desired outcomes. Today, he focuses on assisting sales functions in setting, meeting and exceeding performance expectations and growth goals.

David brings his vast experience in strategy and more recent experience in successful sales leadership to bear in every relationship. Within his process, he works with executive teams to align each part of their go-to-market strategy, sales execution and sales operation with broader company goals. David also trains and coaches salespeople to improve the effectiveness of how they engage with prospects and clients.

David has served on the boards of several nonprofit and community organizations. He earned his bachelor's degree from Iowa State University.

GET TO KNOW YOUR COMMUNITY OF **FRACTIONAL EXPERTS**

SALES



STEVEN R.

SALES

Steve is a passionate and focused team leader with more than 25 years of experience building companies from concept to start up to Fortune 200, including his own business. His areas of expertise include operational excellence, global supply chain development and management and customer engagement/success. Steve earned his BS in international business from Capella University.



BRITNEY M.

SALES

Britney is a sales enablement expert with a proven track record of helping startups and nonprofits achieve their goals through the creation of innovative, engaging and effective learning and development programs. Her diverse experience includes roles in large healthcare companies, startups and nonprofits, as well as teaching. Britney earned her master's degree from New York University.



DIRK D.

SALES

Dirk works with executives and business owners to grow revenue and profit by clarifying strategy, creating a performance culture, and building processes and structure to enable scale. He helps leaders accelerate organizational performance by drawing on his early career in corporate finance, sales and marketing with Fortune 100 companies, including Hewlett-Packard. Dirk earned an MBA from the Olin Business School.







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