

## PHIL MORETTINI

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### SUMMARY OF QUALIFICATIONS:

- Strong business leader with extensive CEO/general management (P&L) experience and skill set
- Problem solver with proven track record of increasing revenue and profitability
- Core functional competencies in product planning/management/marketing, sales & business development
- Team builder with successful startup, Fortune 500, turnaround and M&A experience
- Domain expertise in Software/SaaS, Internet, Wireless, Networking and Semiconductors

### PROFESSIONAL EXPERIENCE:

#### **President – PJM Consulting** San Diego, CA 2000 to Present

*Management Consulting and Interim Executive - Representative Assignments*

##### Database Middleware Software Company

\$3M software company with products aimed at modernizing legacy database applications to SQL databases. Instituted new marketing programs including PPC, direct mail, lead nurturing and channel outreach programs. Pricing, distribution and promotional strategy for new product line. Led business development for partnerships with Fortune 500 software companies. Adviser to the CEO on corporate strategy. Also acting as interim VP-Sales & Marketing.

##### Venture-Backed Search Technology Software Company

Interim VP-Sales & Marketing as well as strategic advisor to the CEO of early stage Search Software company backed by top tier VCs. Products aimed at ecommerce, mobile and embedded systems markets. Designed outbound and inbound marketing programs, pricing, distribution. Tactical involvement in early business development as well as overseeing sales.

##### Turnaround GPS & GIS Hardware Company

Senior advisor to CEO on development of strategy and tactics to turnaround hardware supplier in relatively mature market. Proposed a major new subscription-based Cloud-based service as the core of the new product direction which has market disruptive potential. Re-designed and modified existing promotional products, target market segments, promotion and pricing for existing hardware products, including an integrated marketing approach in combination with the new Cloud service.

##### Website Components Software Company

Early Stage software company with products for the DotNetNuke & SharePoint content management systems. Executive Coaching of CEO, Product Marketing, new third party distribution channel strategy, expanded social media marketing strategy, drove installation of new processes to manage growth.

##### Startup Medical Software Company, Acting Executive VP

Designed and directed the re-launch of medical office software startup including restructuring/introduction of new product, pricing, promotion and distribution strategies within tight capital constraints.

##### Fortune 20 Computer Products Manufacturer, New Product Planning

Defined new Internet Appliance products for company's All-in-One printer division. Developed 3 new product concepts that leveraged existing technology in emerging market categories.

##### Re-start Civil Engineering Software Company

New Product, Marketing and Corporate Strategy for Civil Engineering Design Analysis Software firm.

##### Boutique Mergers & Acquisitions firm

Buy & Sell-Side M&A for multi-national and also privately held clients in the Office Equipment industry

##### Publicly-Traded ERP/Supply Chain Software Rollup

Marketing, Sales and General Management Consulting for acquired companies of a Publicly-traded Parent

##### Executive Education Consulting Firm

Certified Instructor for Value-Based Pricing Course for Fortune 50 Computer/Consumer Electronics Manufacturer

##### Early Stage, Venture-backed Embedded Software Startup., Acting General Manager- SDK products

Interim GM for Software Developers Kit (SDK) business area. Bluetooth products aimed at wireless developers. Developed new marketing plan, sales tactics, promotions and pricing, introducing SDKs with modest budget.

## **President – PJM Consulting San Diego, CA 2000 to Present (Continued)**

### **Digital Photography Image Editing Software Company**

Working with CEO/EVP founders on Corporate Strategy. Company recently received a strategic investment from a major camera manufacturer. Advising on revamping marketing/sales/distribution strategy, product development plan and licensing strategy for new patented interface technology. Also served as interim VP business development to assist in recruiting partners, OEMs and worldwide distributors.

### **Early Stage Security Software Company**

Corporate Strategy and Development for a Security Software company. Advised on corporate direction, product development & marketing. Drove strategy to enter corporate market from initial consumer market beachhead.

### **South African Retail Management Software Company**

Assignment's focus was bringing an early stage South African SaaS company to US market. Devised direct & channel entry strategies, assisted with localization of marketing materials, website & application. Formulated new pricing & positioning. Instituted partnering program & online marketing program. Designed & executed SEO and PPC campaigns. Advised CEO on optimizing the operations of an early stage software company.

### **Internet Lead Generation and Software Company**

Acting in a Senior Advisory/Executive Coach role to increase operational efficiency within a \$5M early stage Internet Marketing and Software Company. Providing assistance in the area of personnel management, organizational structure, Benefits structure for optimal employee motivation, new online marketing initiatives to lower cost of customer acquisition, adding appropriate processes and increasing efficiency in a high growth environment. Developed strategic plan to productize software developed originally for internal use, for sale into existing and new markets. Advised on M&A strategy to gain liquidity for shareholders.

### **Network Management Software Company**

Senior advisor and interim marketing management for young enterprise network management developer. Established online marketing presence, accelerated press relations program provided strategic advice on product planning, product marketing, promotions and pricing. Established analytics program to measure results of promotional activities, enabling feedback and continuous improvement to marketing efforts.

### **Mathematics Software Company**

Represented small Mathematics Software Company with both consumer and B2B products, in effort to acquire a complementary software product. Conducted research, communications with potential seller, due diligence and negotiation assistance. Also spearhead overall corporate development and marketing strategy for organic growth including product planning, International market development, pricing adjustments and new channel development.

### **Medical Device IP SaaS Software Company**

Acting as a senior advisor to a startup software company being spun out of a Medical Device Development company. The company is developing a SaaS tool for evaluation and development of Medical Device IP, along with an eBay-like clearinghouse to bring together buyers and sellers in the Medical Device IP market. Providing education and advice on startup, product planning, marketing strategy, business development and sales/channel strategy.

### **Wireless Retail Systems Supplier**

Conducted an Audit/Review of the Marketing and Corporate Strategy function for this \$20M, privately-held supplier of vertical wireless communications systems to Major Retailers. Recommended structural, tactical and strategic steps to improve company performance going forward. Provided advice to CEO on a number of strategic management issues. Completed an ad hoc market research study on a potential new business opportunity for the company. Researched new international business channel including potential distribution partners.

### **Financial Services-Largest Independent US Broker/Dealer**

As a member of a team with several other consultants, developed an extensive Product/Services menu for a new channel for the \$2B privately held financial services firm. Interviewed key stakeholders to understand business processes and current software-based product offered in existing channels to create a detailed product offering for new channel organization to resell existing and new products and outsourced services to other major financial services institutions, notably Insurance Companies.

## **President – PJM Consulting San Diego, CA 2000 to Present (Continued)**

### **Singapore-Based Wellness/Beauty SaaS Software Company**

Retained to sell the assets of early stage software company providing complete management software solution to a variety of markets including Hair Salons, Nail Salons, Health Clubs, and Spas. Provided advice on potential price and marketing approach. Developed Confidential Information Memorandum (CIM) as primary marketing document. Developed list of potential buyers to contact and negotiate the sale.

### **SEO SaaS Software & Services Startup Company**

Assisted with the launch of a new SaaS-based SEO software company with a backend Writer's Marketplace. Advised on positioning, Go-To-Market strategy, product planning & implementation of tactical marketing programs.

### **Data Analytics Software Company**

Instituted new marketing programs plan for \$2M software company with products aimed at business modeling, risk management and decision support. Increased efficiency of existing online marketing programs and instituted new online marketing programs including social media marketing activities, more than doubling website traffic within several months Reduced PPC program cost/lead by more than 80%. Created and instituted a VAR program for the company to expand reach into 3<sup>rd</sup> party channels, including program details and reseller recruitment.

### **Specialty Call Center Telecom Carrier**

Conducted complete review of Sales & Marketing Structure & Operations to support 3 year exit strategy for a \$10M VoIP telecom carrier of specialty calling services aimed at the Contact Center Market. Proposed sweeping overhaul of sales & marketing processes and activities, as well as a novel de-coupling of the company's core differentiating IP from the commodity telecom services to improve competitive positioning in the market.

### **Industrial Contractor Management SaaS Software Startup Company**

Reviewed Alpha version of application and business, marketing and sales plans for this startup. Product originally aimed at generic small business market. Re-targeted business toward the industrial contractor market where the founders have significant contacts and experience. Advised on proper beta cycle, value proposition, application features, benefits & UI as well as go-to-market strategy and tactics.

### **Singapore-based Corporate Training/Performance Management SaaS Software Startup Company**

Reviewed Alpha version of application and business, marketing and sales plans for this startup. Advised on making application more user-friendly, Advised on proper beta cycle, value proposition and pricing strategy. Reviewed and improved initial marketing collateral including brochure and website.

### **Physical Security Hardware & Software Company**

Created and assisted in implementing product plan and marketing strategy for a startup physical security technology company. Product has several components including physical security hardware with cellular/GPS tracking, mobile software and SaaS-based cloud server application. Product fits in the IoT market and is aimed at security applications such as warehouse security and cargo security & tracking.

### **Educational Software Company**

Advisor/Consultant to principals of SaaS-based educational software company targeted at universities and other higher education institutions. Software provides a streamlined, online workflow to track internship hours and activities. Product sold both B2B (institutions) and B2C (students). Advised on marketing/sales strategies as well as participated in implementing tactics with led to a 50% increase in revenue in the first year of my tenure, leading to acquisition by Private Equity (PE) platform company at a 4-5 multiple of revenue. Assisted with integration and growth post-acquisition.

### **AdTech Software Company**

Interim CEO for US-based online ad network software and services company with investors and operations in Brazil and Portugal. Turnaround engagement, as company faced a number of difficulties due to extensive interpersonal and legal turmoil between previous management and external shareholders. Led company restart to capitalize on substantial product differentiation/benefits amid difficult operating and financial environment.

### **Healthcare AI/Data Analytics Software Company**

Senior Advisor/Consultant to CEO of VC-backed, UK-based medical software startup. Provided CEO mentoring services as an external advisor and sounding board, along with advice on corporate strategy, staffing, marketing, sales tactics.

### **Insurance Brokerage Company**

Conducted a market study of internally developed insurance software applications to scope viability and potential as commercial products. Wrote a detailed report with findings, including product planning and Go-To-Market recommendations.

### **Legal Software Company**

Performed an extensive strategic review of early stage legal software company. Consulted with the CEO, troubleshooting current issues as well as writing a report with recommendation on new products, personnel, channel/international strategy, and a variety of improvements to Go-To-Market tactics.

**VP, Sales & Marketing - Patriot Scientific Corporation** San Diego, CA 1997 to 2000

Publicly Traded Communications & Wireless Semiconductor Company. Managed Sales, Marketing and Corp. Strategy for two divisions including broadband cards and embedded microprocessors/IP.

- Sold 15 microprocessor design wins in pre-production with minimal marketing budget
- Focused microprocessor strategy on Java wireless space, positioning company as first mover
- Established close partnership with Sun Microsystems, leveraging their Java market position
- Set up a distributor/rep network of 11 companies to target OEMs in Europe & Asia
- Negotiated a \$400K IP licensing deal in pre-production, with a Japanese government agency
- Initially repositioned communications product line for distribution to Network VARs and ISPs
- Recommended harvesting Comm. Division revenues to focus on microprocessor business
- Directed a staff of 6 including sales reps, marketing manager and applications engineers

**President & CEO - Adept Computer Solutions** San Diego, CA 1995 to 1997

Startup Mapping Software Company. Appointed to "re-start" and reposition company for growth. Products included packaged consumer software and developer tools aimed at OEMs.

- Responsible for overall management of the company, including P&L
- Increased company revenue 80% during first 12 months of tenure
- Worked creatively and successfully to grow company with very tight capital constraints
- Created a new product utilizing existing technology, contributing 40% of revenue
- Increased number of retail stores from 10 to 1000+ in less than 18 months
- Repositioned company product and marketing strategies to vertical business markets
- Sold through multiple channels including distributors, retail, VAR and direct marketing

**President - PJM Associates** - San Diego, CA 1993 to 1995

Consultant for management, marketing and distribution strategies for high tech companies. Assignments in product/business planning, business development, distribution strategy, and M&A.

**VP-Division Manager - Horizons Technology**, San Diego, California 1990 to 1993

\$3M division of a \$50M Software and Services Company. Company Officer and Division Manager with complete general management (P&L) responsibility for Network/Systems Management Software and Search Engine Software product lines. Managed a staff of 30+ across all functional areas in a high growth environment. Network Management software line consisted of a suite of products marketed to network administrators and included Backup, Security and Asset Management applications. Search Engine products included packaged consumer product sold via retail and direct mail and also a Developers Kit aimed at ISVs, OEMs and corporate developers.

- Personally conceived original business and product/marketing plans
- Drove explosive growth from startup with staff of 3 to annual run rate of \$3M+ with profitability and consistently under budget
- Reached profitability with \$2.5M invested capital
- Led acquisition of complementary SW company, adding four products and key engineers
- Lead product won several Editor's Choice awards from key industry magazines
- Expanded product family to nine products distributed through indirect and direct channels
- Signed 26 Domestic and International distributors in 15 countries and over 1000 VARs
- Personally negotiated a 60,000 seat, corporate-wide license with the Boeing Corporation
- Promoted twice during tenure, from Director Sales/Marketing & Marketing Division Manager

**Market Manager - Spectragraphics**, San Diego, California 1988 to 1990

\$35M manufacturer and software developer of CAD and communications hardware and software products for mainframes, workstations and PCs. Responsibilities included Market Development, Product Management and Account Management

- OEM Account manager for HP, Silicon Graphics and Apollo, representing \$5M in contracts
- Conceived new product plans for groundbreaking Unix software & hardware products
- Proposed and spearheaded project to acquire a complementary PC graphics company. Worked directly with CEO on candidate identification, due diligence and negotiations

**Product Manager - Hewlett-Packard, San Diego, California 1983 to 1988**

\$450M division of \$8B manufacturer. Product Marketing for computer graphics peripherals for the CAD market. Product definition, pricing, promotion and distribution strategies for \$90M product line

- Wrote strategic product and market introduction plans
- Designed a new indirect distribution strategy with 15% price cut for an existing product family, resulting in a unit sales increase of over 600% within six months
- Led special project that reduced inventory 50% via forecasting/product configuration
- Also spent 6 months as a Dealer Sales Development Manager for desktop color printers, driving revenue of assigned region from last to first in worldwide growth

**Assistant to President - Teledyne Continental Motors, Muskegon, Michigan 1981 to 1982**

\$60M industrial engine company within an \$8B conglomerate. Managed product development and new engine family launch with \$5.2M budget, as well as special projects for company president.

**Product Design Engineer - Ford Motor Company, Dearborn, Michigan 1979 to 1981**

\$18B division of \$90B Company. Designed body & engine components for pickup trucks & SUVs.

**EDUCATION & AFFILIATIONS:**

University of Detroit, M.B.A. (1981)

University of Illinois, B.S., General Engineering (1979)

Former Chairman, San Diego Software Industry Council (SDSIC) C-Level Steering Committee

Former Technology Columnist/Blogger, San Diego News Network (SDNN.com)

SoftwareCEO.com, Former Moderator-Ask the Experts! forums