

# TESTIMONIALS



*“Dan’s expertise, business acumen and client management skills made him invaluable in growing our business. His ability to find creative solutions and partner across organizations were **key to achieving our growth targets.**”*

— **SKIP SMITH**, CEO/Entrepreneur



*“Dan has been **helping me grow and scale organizations for over 18 years.** Dan has been a key leader helping to drive enterprise value and deliver successful exits to our investors. Dan is particularly strong at aligning cross functional teams around key goals and measurements and driving profitable execution. Dan brings together customer satisfaction, employee engagement, and organizational performance.”*

— **KIRK BOTULA**, CEO/President/Serial Entrepreneur



*“Dan helped me to improve client satisfaction and retention by overhauling and scaling operations. Dan helped me to transform the fund administration department by making the processes more effective and efficient and bringing in technology to automate key processes where possible. He helped my team to create a training program for all fund administration department members to ensure that the new process and technology would be leveraged across the entire department to scale operations and ensure that customers received the service that they deserved. Dan was **instrumental in ultimately retaining and improving satisfaction for key clients** by improving the customer experience through the changes he helped implement.”*

— **GARY TENKMAN**, CEO

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“Dan helped grow the organization by understanding the strategic needs of the organization and then putting in place the necessary capabilities, including a high-performance culture and a commitment to operational excellence, to execute on our strategy. With Dan’s help, we were able to maintain a sharp customer focus that **resulted in growing revenue by more than 20% while also exceeding the expectations of our customers.**”

— **MATT LOEB**, CEO



“As Board Director, it was critical to me that the executive management team was made up of and supported by strong leaders with unquestionable integrity. Dan proved that to me and the Board every day. Dan’s role was vital to the success of the company and helped it to quickly scale and grow. He helped us to find our path by establishing aggressive (yet achievable) goals and a complete strategy. With Dan’s help, we were able to execute on the strategy and exceed our goals, **resulting in happy clients, increased enterprise value, revenue and profitability.**”

— **RON SAULL**, Board Director



“Before Dan, we were struggling to find our way and Dan was able to quickly put us on the right path. With Dan’s help, we were able to define, execute and deliver: satisfied partners, loyal clients, happy board members, **increased revenue (~20% per year), profitable growth and overall increased enterprise value.** He not only worked to understand the business, but also the people working at the business to build a team that could meet our challenges.”

— **KATIE TARARA**, Senior Director



“Dan’s process helped not one but two companies that I have worked for in the past 10 years to scale and grow. Dan is one of the smartest and results-driven leaders I know. I first met him in 2006 when I joined a leadership team at Confluence. Over the years he helped us to grow the business significantly and more recently Dan helped at the CMMI Institute to **drastically increase revenue and profitability by showing us the right path forward.**”

— **JOAN TESLA**, Vice President of Marketing



“Dan helped me to turn around a declining revenue and EBITDA business. Dan quickly diagnosed that we had a broken business model, a “washed-up” product line, and a toxic culture. He advised me and the leadership team on how to navigate an organizational turnaround that resulted in: revenue growth of 20% per year, positive EBITDA, an overhauled business model and a high-performance culture. His leadership, insight and business acumen contributed to **increasing enterprise value by almost 225% in five years.**”

— **DOUG GRINDSTAFF**, Senior Vice President/Tech Entrepreneur



“Dan was instrumental in scaling and growing our business. He helped the organization reach its potential by defining clear goals and a well-thought-out strategy. With Dan’s help we were able to execute on the strategy and exceed our goals, **resulting in increased enterprise value, revenue and profitability.**”

— **ROBB MICEK**, CFO