



Where others see problems, I see possibilities.

Richard Westrick

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Chief Operating Officer (COO)

Driving Growth, Fostering Innovation, & Nurturing a Thriving Corporate Culture

Results-driven operations executive with 30+ years of experience in management, entrepreneurial leadership, and long-range strategic planning. Leverage expertise in operations management, sales, marketing, IT, finance, coaching, and HR to streamline operations, lead change management initiatives, and establish efficient processes for business growth.

Strategic visionary with the proven ability to bring clarity to chaos, translate vision into action, and align operational strategies with broader business goals. Believe in the magic of operational efficiency, the beauty of automation, and the art of streamlining processes.

Master of interdepartmental synergy, building a high-performing team while inspiring and leading cross-functional groups, fostering a culture of collaboration, innovation, and continuous improvement. Skilled in data-driven decision-making to optimize performance.

Tech-savvy problem solver with solid experience in building SaaS and consulting businesses, navigating technology challenges effectively, developing innovative tools, and driving profitability.

Areas of Expertise

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|---------------------------------------|-----------------------|---------------------------------------|
| ➤ Operational Leadership | ➤ Strategic Planning | ➤ Leadership & Business Establishment |
| ➤ Automation & Technology Integration | ➤ Budgeting & Finance | ➤ Sales & Marketing Leadership |
| ➤ Technical & Business Consulting | ➤ P&L Oversight | ➤ Business Scaling / Revenue Growth |
| ➤ Sales & CRM Tool Development | ➤ Data Automation | ➤ SaaS Product Development |
| ➤ New Business Development | ➤ Staff Development | ➤ Compliance & Risk Management |

Career Highlights

- Cultivated cohesive culture at ITR; recognized 3 consecutive years as a "top 10 best company to work for in New Hampshire."
- Innovated a SaaS product that provided correlation analysis of company data against leading indicators that contributed to ITR's \$12M top-line goal.
- Introduced "SalesTracker," an internal SaaS sales tool to track and monitor the various schools' sales stages, significantly contributing to \$1M in sales at Collaborative Learning.
- Launched "Curriculum Mapper," a groundbreaking SaaS tool for educators that enhanced student learning by monitoring and sharing curriculum, resulting in a revenue stream exceeding \$10M.

Executive Experience

Chief Operating Officer

August 2022 — Present

SmartEd Systems | Ashland, OR

Software company that provides a suite of tools and support for proficiency-based grading.

Hired to establish company-wide infrastructure encompassing accounting, marketing, sales, and management functions.

Implemented new processes to streamline management meetings, strategic planning, and problem-solving. Oversaw budgeting, cost control procedures, revenue optimization, and financial performance tracking.

- Orchestrated the development of a marketing website, email campaigns, and social media presence to generate leads and move them to become thought leaders.

Chief Executive Officer (CEO)

August 2021 — Present

BoatProject LLC | Manchester, NH

Software company offering SaaS products for recreational boat owners.

Established LLC and built a robust business infrastructure. Led end-to-end sales, marketing, product development, and financial operations. Oversaw overall business performance and collaborated with programmers to boost product value and drive revenue growth.

- Designed and created a SaaS product that organized projects, tasks, manuals, and documentation for recreational boat owners.

Chief Operating Officer

2014 — 2022

ITR Economics | Manchester, NH

Economic consulting firm that provides businesses with financial analysis and forecasting services. | \$12M annual revenue

Hired to resolve cultural conflicts within the Economist and Sales departments. Led a team of 6 direct reports in managing all operations for the Belgium office and company-wide, including IT, Accounting, HR, and Econ Production. Opened a new office in Texas.

Controlled worldwide territory with full P&L responsibility. Coached the Executive Team to enhance leadership skills and achieve top-line growth and profitability recognition.

- Drove annual growth of 10-15% after years of stagnation, providing a retirement path for owner by optimizing Sales team performance through coaching while implementing KPIs for tracking progress.
 - Shifted from generating the majority of leads through speaking engagements to generating 95% of marketing leads via social media and the website, expanding the pool of potential clients and fostering business growth opportunities.
 - Enhanced pricing strategy, allowing significant price hikes with minimal customer loss.
- Converted Economist and Sales teams' cultural divide into a united front with improved productivity, boosting retention rates from 75% to 85%+ during challenging times, including the pandemic, elevating customer satisfaction.
 - Achieved recognition as "One of the Top 10 Best Companies to Work for in New Hampshire" by Business New Hampshire Magazine for 3 consecutive years.
- Scaled consulting business, contributing 40% of total revenue. Elevated retention rates as employees embraced the challenge and support stemming from innovative skill development initiatives and a robust online learning system.
- Transformed operations, boosting monthly deliverables from 70 to 200+ with minimal missed deadlines. Established specialized roles, improved project management, and enhanced work-life balance, ensuring on-time end-of-month deliveries.
- Maximized pandemic-era speaking revenue via a high-quality TV studio, transitioning to remote engagements and adding \$200K through record-breaking paid webinars, including 1,200 views for a single event.
- Generated an additional \$200K in revenue by launching a SaaS product that allowed customers to upload and visualize data against leading indicators to forecast business trends. Harnessed existing labor and expertise, minimizing additional costs.
- Boosted data department efficiency by automating updates for 20K+ data series with Python and IT collaboration, reducing manual workload significantly.
- Enhanced operations by relocating and promoting an Economist from Belgium to the US as VP, boosting forecast accuracy and savings.

Co-Founder / President / COO**1999 — 2014****Collaborative Learning (CL) | Westmont, IL***Offers SaaS educational software products serving K-12 Schools worldwide. | 55 employees | \$10M+ annual revenue*

Pioneered an early SaaS business, managing code, server operations, security, and performance. Created the business structure, expanded departments, and devised a visionary roadmap aligned with core values and organizational goals. Promoted curriculum mapping benefits and data storage solutions to educational institutions.

- Established and scaled a business to over \$10M in revenue by launching "Curriculum Mapper," an innovative SaaS tool for educators that enhanced student learning through curriculum tracking and sharing.
- Drove impressive YOY revenue growth and established thought leadership in curriculum mapping via a well-attended national conference.
 - Attracted thousands of educators, surpassing established thought leaders, who later sought CL's support.
- Initiated "SalesTracker," the pioneering SaaS Sales tool, streamlining operations during rapid growth and enabling rapid school setup. Instrumental in reaching \$1M in sales.
- Addressed embezzlement crisis by collaborating with law enforcement and terminating offenders. Safeguarded business stability by managing staff reductions, maintaining vendor and customer relationships, and resolving bank and IRS issues in 10 months.
 - Operated lean and profitably for 24 consecutive months, successfully attracting private equity investment for stock acquisition and business expansion.

Founder, President**1996 — 2005****Westrick Consulting | Westmont, IL***Served companies in various industries with computer system consulting and support. | 12 employees | \$1M in annual sales*

Business and technical consulting firm that helps clients succeed by providing solutions that improve their operations and profitability. Aligned mission, values, and vision through strategic planning. Managed daily operations, including customer service, inventory, and marketing, while organizing and overseeing multiple teams.

- Revamped Xerox's sales data system, reducing a 45-day delay by connecting a web server with the mainframe that produced real-time updates, resulting in faster sales, higher customer satisfaction, and numerous referrals.
- Promptly resolved a financial planning firm's critical issue by clearing an internet traffic blockage due to hosting a phishing site. Reestablished traffic with Comcast's high-level support within 48 hours, enhancing security for uninterrupted operations.

Additional Information**Education:** Bachelor of Arts with a concentration in Economics, University of Illinois Urbana-Champaign**Affiliations:** Member, Vistage International (2003 — 2014) - Voted Member of the Year in 2008 | Member, Highrise Networking, Boston, MA (2021 — 2022)