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# JEFFREY LORTZ

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Boston, Massachusetts • 617-462-3229 • [jeff.lortz@gmail.com](mailto:jeff.lortz@gmail.com)

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## Summary

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Enterprise SaaS – Private Equity – Digital Transformation

*Executive Leader for GTM Strategy, Customer Success, Product Innovation, M&A, and Operations*

**Experienced C-suite executive in PE-backed Enterprise SaaS.** Customer and market-focused executive leader able to strategically align product capability to market opportunity and define GTM strategies to acquire new logos and drive growth and retention in the customer base. Pivotal member of executive teams in public and private companies ranging from \$10 million to \$2 billion in revenue. Successfully built services business in new global markets, turned around struggling business units, restructured large, complex organizations, managed acquisitions, and launched new products and services.

### COMPETENCIES

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GTM Strategy – M&A - New Product Introduction - PE Transformation - P&L Management - SaaS Growth - Customer Success – New Business Sales - Account Management - Field Enablement - SaaS Operations - Professional Services - Customer Support - IT and Business Operations

### RESULTS

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As a CEO, made two acquisitions and attained a 60% increase in New Business Sales, doubled growth Sales, and grew ARR by 28%. Also, improved NRR to 108% and a 40% improvement in EBITDA. Incubated new service business to \$6M in 3 years and managed global P&Ls as large as \$150M at 30% gross margins. Built comprehensive SaaS customer success programs resulting in 95% retention. Designed and implemented complex service portfolios across multiple global technology practices, driving \$250M in service revenue. Developed a global team of architects and managed as many as 600 consultants and managers.

### EXECUTIVE EXPERIENCE

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<b>PRIVATE EQUITY</b> <b>ProcessMaker</b> <b>Aldridge Capital Partners</b> <b>April 2023 – Present</b>	Chief Executive Officer (Interim)
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Led the transition of a \$15M ARR PE-backed SaaS provider from founder-leadership, achieving a 12% ARR growth in FY23. My tenure was characterized by transformative leadership, optimizing financial health, accelerating product innovation, expanding market reach, and enhancing customer engagement, positioning the company for future success in the competitive technology landscape.

- Executed strategic restructuring, reduced OPEX by 18% to reach break-even EBITDA, and revitalized product development with a 90-day release cycle, introducing two major updates featuring generative AI technologies.
- Redefined our Go-To-Market (GTM) strategy, generating a \$20M inbound pipeline and increasing direct and channel sales by 60% and 11%, respectively. This was achieved through innovative messaging, branding, and an enhanced mar-tech stack.
- Customer experience enhancements led by an upgraded Customer Success team resulted in an FY23 exit NRR of 108%, with upsell and cross-sell performance improving by 23%. These efforts underscored our commitment to customer satisfaction and loyalty, driving sustained growth.

<b>PRIVATE EQUITY</b> <b>Fastr Corporation</b> <b>Akmazo Partners</b> <b>September 2021 – April 2023</b>	<p style="text-align: right;">Chief Executive Officer</p>
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Led organizational and business transformation of \$10m recurring revenue SaaS business. Fastr is an online storefront development platform for enterprise e-commerce marketers

- Completed full product refactoring and hosting migration. Improved quality and performance challenges and improved customer retention from 55% to over 80% in first year.
- Introduced a new flagship product with the goal of disrupting an existing market with a highly differentiated solution. In conjunction with the release, rebranded the company and established a strategic partnership with a powerful incumbent in the market.
- Sourced, closed, and integrated strategic acquisition of a digital marketing agency to complement solution
- Upgraded the executive leadership team adding seasoned SaaS industry executives to the Sales, Product, G&A, and Marketing functions
- Implemented business process improvement in strategic planning, operational management, internal communication, and corporate governance.

<b>PRIVATE EQUITY</b> <b>Vista Equity Partners</b> <b>Centerbridge Partners</b> <b>August 2018 – September 2021</b>	<p style="text-align: right;">Chief Operation Officer (Tomia – Vista)  Chief Customer Officer (Acoustic – Centerbridge)</p>
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The transformational leader of customer operations at Tomia (\$60m Enterprise SaaS, Telecom business systems) and Acoustic (\$200m Enterprise Marketing Technology).

- Led transformation of renewals team inherited from carve-out to a highly productive global customer success and account management team that improved retention on \$160m ARR business from 45% to over 80% in 4 quarters while driving \$34m in expansion sales.
- Deployed multiple new business systems CRM (Salesforce), Gainsight, ZenDesk, NetSuite, and implemented offshore outsourcing of Customer Support to a large global managed services vendor. Implemented Knowledge Support and ITIL practices, achieving consistently high CSAT and SLA performance.
- Managed complex acquisition integration of a \$45m Israeli business into a \$25m base business, combining GTM functions and establishing a new brand in less than three months.
- Implemented extensive customer success programs and initiatives, including a tiered engagement model, Customer Health Index (CHI) tracking, NPS programs, get well and success planning, CSM training and development programs, custom nurture and adoption programs, and online learning libraries.
- Transformed poorly performing Professional Services business to achieve consistent top-line growth and high utilization. Developed service catalog offering premium onboarding services, system integration, technical account management, and managed services.

<b>EVERBRIDGE (NASDAQ: EVBG)</b> <b>Burlington, MA</b> <b>June 2012 – July 2018</b>	Vice President of Corporate Strategy and Operations Chief Information Officer Vice President, Professional Services and Sales Operations
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Everbridge, the world's recognized leader in Critical Event Management solutions, merges technology with industry expertise to help millions of people communicate in a crisis, manage operational incidents, and connect daily.

**VP of Corporate Strategy and Operations**

Reported to the CEO, drove corporate strategy and business planning for a \$100M+ run rate SaaS company, achieving 30% CAGR with a successful IPO in 2016. Facilitated execution of high-growth strategy. Defined and led initiatives to achieve positive EBITDA and over 70% gross margins. Additionally, I led corporate development, facilities, IT, and employee communication initiatives that led to 2 consecutive years of achieving BBJ *Best Places to Work* designation.

Responsible directly to the CEO for the design and implementation of a strategic business planning system that delivered:

- Sales channel development consistently achieved greater than 30% bookings growth and 95% renewal rate
- Agile software delivery lifecycle releases every 2 weeks
- Employee engagement and professional development programs achieving less than 8% turnover
- Evaluating and managing the integration of 5 acquisitions and multiple new channel sales relationships

**Chief Information Officer (CIO)**

Promoted to become the company's first CIO to consolidate and optimize business systems spending and align IT functions to corporate objectives.

- Responsible for procurement and management of the company's critical business systems, including ERP, CRM, marketing automation, and BI systems. Delivered key system enhancements, including CPQ deployment, sales automation, customer self-service, and CRM/ERP integration.
- Manage the company's global real estate portfolio and facility management teams. The portfolio includes over 90k RSF across six global locations. Recent projects included a 20k RSF/100-employee relocation and a 48k SF 5-year lease negotiation with architecture/design/construction from Shell.

**VP of Customer Success and Sales Operations**

Initiated and grew a Customer Success program that delivered 95% retention and \$9M in Professional Services revenue in 2017.

<b>UNITED STATES NAVY</b>	Surface Warfare Officer (Nuclear)
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Served seven years as a line officer—Main Propulsion Assistant on USS Long Beach and Naval Department Head school instructor.

**EDUCATION**

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Post-graduate courses in Corporate Finance, Visiting MBA Program, Boston College  
M.B.A., University of Rhode Island  
B.S. Mechanical Engineering, University of New Hampshire

**PRIOR EXECUTIVE ROLES**

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BMC SOFTWARE (NASDAQ: BMC)  
BLADELOGIC (acquired) (NASDAQ: BLOG)

Vice President, Global Practices (BMC Software)  
Vice President, Professional Services (BladeLogic)

KALIDO (acquired: Magnitude Software)

Global Director, Professional Services and Customer  
Operations

PEGASYSTEMS (NASDAQ: PEGA)

Vice President, Professional Services, Americas

BOWSTREET (Acquired by IBM)

Vice President, Professional Services

PTC CORP (NASDAQ: PMTC)

Senior Vice President, Global Services  
Vice President, Global Services, Americas  
Director, Consulting Services  
Practice Manager, Data Management  
Data Management Consultant