

CHIEF REVENUE OFFICER

RESPONSIBILITIES

- **Strategic Planning.** Build and maintain strategic roadmaps for revenue-related activities and teams, in partnership with other key leaders. This involves initial setup and ongoing management following existing strategy management process. Each portfolio company should have an active strategic roadmap reflecting general and specific strategies.
- **Audience Segmentation.** Customer Profiles & User Journeys. Understand markets and customer segmentation to develop customer profiles and journeys. Create and maintain these fundamental artifacts as a basis for downstream programs, processes, and interventions.
- **Marketing Infrastructure & Operations.** Establish and improve marketing programs, department and role structure, processes and procedures, compensation, and related items. Provide for leadership and management of the marketing team, including content, engagement, conversion, and tracking thereof.
- **Sales Infrastructure & Operations.** Establish and improve sales programs, department and role structure, processes and procedures, compensation, and related items. Provide for leadership and management of the sales team, including quotas, targets, and tracking thereof.
- **Pricing & Revenue Management.** Develop and implement technology-enabled pricing and revenue management strategies based on process, philosophy, and analytics. Identify opportunities for revenue growth, and optimize the revenue streams over the entire customer lifecycle.
- **Customer Success & Retention.** Provide for excellent experience throughout the customer lifecycle, including onboarding, customer communication and community management, issue resolution, upselling/ renewing, and retention.
- **Channel & Partner Programs.** Identify new markets or channels for expansion. Provide for effective program design, including agreements, incentive alignment, staffing, process and partner relationships, community management, and tracking.

OVERVIEW

The Chief Revenue Officer (CRO) is responsible for setting strategy and implementing revenue-related activity across a portfolio of affiliated companies. Areas of responsibility include marketing, sales, pricing, customer success, technology, training, and analytics, with a particular focus on partnerships and channel relationships, and technology enablement. The CRO will have varying levels of involvement in portfolio companies, from advisory or oversight to filling key positions on a fractional basis, working with dedicated and shared teams and resources. Portfolio companies include professional services, technology, insurance, real estate, energy, and other sectors. The CRO also assists in evaluating new investment opportunities. The CRO adds value throughout the lifecycle of our companies, from startup to growth, to maturity or disposition, and leverages skills across multiple industries. Given this scope, success factors include working across disparate products and teams and effectively intervening through both hands-on work and advisory support. This is an executive level position with significant expectations relating to quality of work, team and project management, and the ability to conceive of and execute revenue-oriented activities that materially advance the capabilities and success of the portfolio companies. This in-office role is based in Houston.

RESPONSIBILITIES CONT.

- **Technology Enablement.** Identify tech stack for sales, marketing, and customer success with a focus on leveraging existing core platforms. Implement and optimize technology and tools to promote effective operations and increase revenue. Focus on eCommerce and customer online experience.
- **Data & Analytics.** Develop key reports, dashboards, and metrics, beginning with data strategy and governance. Provide accurate revenue forecasts, and product, campaign, and individual performance analytics.
- **Training - Ensure sales, marketing, and customer success teams** have the necessary resources, tools, and training to achieve their targets. Work with the Learning & Development team to curate and create training materials and oversee their utilization.
- **Product Creation & Management.** Review and improve productization of customer offerings, including market and needs analysis, product-market-fit, and marketing and sales approaches. Ongoing product management. Continuously analyze market trends and competition and adjust accordingly.
- **Internal Communications and Coordination.** Facilitate communication between relevant departments and ventures; communicate with key stakeholders, including the board of directors, regarding revenue performance and projections.
- **Community-Facing Responsibilities.** Participate in speaking engagements, investor meetings, and interviews as appropriate.
- **Budgeting and Resource Allocation.** Develop budgets for sales and revenue-related activities. Ensure optimal allocation of resources for revenue-generating initiatives.
- **Legal and Compliance.** Ensure all revenue activities comply with regulations and industry standards. Coordinate with legal teams on contracts and agreements.
- **Potential Investments Evaluation.** Provide support, due diligence, and support to teams evaluating new investment opportunities, startup ventures, and spin-offs.

COMPANIES

The following represent current ventures and related focus areas or projects requiring leadership or support.

BOXER PROPERTY®

Boxer Property Management Corporation is a real estate company that specializes in the acquisition, development, and management of commercial properties, including office buildings and retail spaces. The company offers a range of services such as leasing, property maintenance, and tenant relations, aiming to provide a high-quality experience for both property owners and occupants.



Boxer Workstyle is a Boxer sub-brand aimed at providing flexible and innovative workspace solutions. The offering includes a range of options from co-working spaces to private offices, all designed to meet the diverse needs of freelancers, startups, and established businesses, while fostering collaboration and productivity.



Relay Human Cloud provides turnkey international workforce globalization, helping companies expand with a model that makes sense to both employers and employees. Relay empowers companies to access a global talent pool, expand to new markets without the traditional risk, and provide a better quality of life for all.



Toco Warranty provides vehicle service contracts (extended warranties), giving car owners simple, affordable coverage for various types of vehicle repairs, helping manage the financial risk of unexpected mechanical issues.



Stemmons Enterprise (relaunching as Brava Systems) is the enterprise management system for the real estate industry that connects property, people and processes, and third-party systems, to deliver a seamless and efficient organization, unified data, and actionable AI.

GENERAL REQUIREMENTS

The successful candidate will have experience leading sales and marketing departments, and developing and implementing commercial strategies across multiple industries and multiple company stages. In particular, the ability to build systems and harmonize both sales and marketing with a comprehensive strategy is paramount. Experience in an agency setting or as a principal or executive in multiple companies helps.

- **Educational Background.** Bachelor's degree in business, marketing, or related field; Master's degree or MBA preferred.
- **Experience.** Minimum of 10 years of experience in a senior revenue-focused role with proven track record of success; experience in multiple industries is a plus.
- **Strategic Thinking.** Ability to set and implement revenue strategy across multiple affiliated companies with diverse product offerings.
- **Expertise in Multiple Areas.** Demonstrable experience in marketing, sales, pricing, customer success, technology, training, and analytics.
- **Focus on Partnerships.** Strong network and experience in developing channel relationships and partnerships.
- **Technology Enablement.** Understanding of how technology can drive revenue; experience with CRM, marketing automation, call centers, and other sales technology.
- **Adaptable Advisory and Implementation Skills.** Ability to adapt to varying levels of involvement in portfolio companies, ranging from advisory to hands-on implementation roles.
- **Team Management & Leadership.** Proven ability to lead both dedicated and shared teams and resources effectively, with a focus on fostering a culture of excellence and collaboration.
- **Cross-Functional Skills.** Ability to work across disparate products and teams and to provide both hands-on work and advisory support.
- **Project Management.** Strong project management skills, with experience in overseeing multiple projects simultaneously.
- **Communication Skills.** Excellent written and verbal communication skills, including the ability to present and negotiate effectively.
- **Analytical Skills.** Strong aptitude for data analysis and using data-driven insights for decision-making.
- **Travel.** Willingness to travel as needed to meet with portfolio companies, partners, and stakeholders.

CONCEPTUAL MODEL

The Chief Revenue Officer is involved in all aspects of the revenue lifecycle. This begins with determining Strategy, identifying Tactics, managing Execution, and performing Analyses that help inform ongoing Strategy. In addition, the CRO has key roles in communication and interaction between both Internal and External constituencies. The diagram below provides a high-level conceptual model of these responsibilities.

