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Summary

Technical software executive with a proven track record of turning ideas into profitable products on a bootstrapped budget. Rare combination of intuitive business sense, technical excellence, and social fluency. Dynamic strategist, expeditious analyzer, effective negotiator, adaptable facilitator, and decisive leader. Capable of inspiring a culture of innovation, ambition, and achievement while meeting deadlines, delivering profitability, and shipping fantastic products.

Skills

Business and Leadership

- Effective at finding common ground, conveying value, and forging win-win partnerships with a variety of personality types. Can conversely extract compromise from third parties when necessary.
- Strong client relationship skills, including salesmanship, problem assessment and resolution, and overall customer relationship management, especially in the consultative environment.
- Capable of managing and prioritizing multiple projects simultaneously, including direction of staff, equipment, and resources. Absorbs new applications, developer tools, utilities, and methods quickly. Notorious for cheaply and creatively adapting available resources to achieve unexpected success.
- Adept at defining and communicating issues effectively and determining multiple solutions for any given problem. This skill translates well across multiple disciplines, from personnel management to client relations.

Engineering & Product Development

- Superpowers: PHP, AWS, JavaScript, architecting web-scale applications, DOM manipulation, database design (from RDBMS optimization to where and when object storage solutions make sense), HTTP caching, pragmatically defining an MVP, managing deployments, building REST APIs, strategies for scaling on shoestring, and best practices for assembling, working in, and directing engineering teams. Also well versed in the various implied tools and frameworks surrounding the mentioned ecosystems, from server lifecycle management on EC2 to managing how npm and composer are integrated into production deployments.
- Well-versed, but the manual is helpful: Using the "--hard" github flag, accessing IMAP from a CLI, whiteboarding the oauth2 flow diagram, configuring nginx for reverse proxying, debugging a CircleCI job that works locally, ambitious bash scripts, and anything that absolutely requires the usage of Windows.
- In a pinch: Perl, Ruby, GoLang, debugging segmentation faults, updating the Flash ROM on any given VoIP device, and wrangling ImageMagick.

Other Surprises

- Complements legal folks by identifying loopholes and unintended consequences in legal contracts.
- Teachable. Takes a knee when faced with emotional conflict; openly asks for ideas, feedback, and buy-in within a solutions-oriented environment.

Experience

Merus, Inc. | Oakland, California
CEO, Founder, & Principal Engineer   2008 – 2019

Merus, with its eponymous product, MerusCase, developed and marketed a SaaS software platform targeted at attorneys to manage their practices. Beginning with the first MVP released in mid-2009, MerusCase was eventually deployed in over 1000 US law firms, focused heavily in procedural legal niches, like Workers Compensation, Personal Injury, and Immigration.

The MerusCase product eventually came to encompass a broad set of features, including document management (inline authoring, editing, and tracking for both Word & Acrobat), integration with various court systems, group

calendaring, group rolodex, statute management, customizable and extensible time tracking, accounts receivable, secure web-based email, email synchronization (IMAP), native Apple calendar and contact sync (CalDAV/CardDAV), and hundreds of other bells and whistles all centered around the lifecycle of legal cases and automation-based improvements to law firm profitability.

The MerusCase product and associated assets were sold to ASG LegalTech in March 2019. Annual recurring revenue (ARR) at the time of sale exceeded several million dollars. LOGO churn was always extremely competitive, hovering around 3% overall and under 1% on first anniversary renewals (effectively zero when discounting natural attrition, i.e., customers closing their doors due to retirements, consolidation, or similar).

As founder, I was called upon in every aspect of the business, both formulating strategic vision and implementing hands-on in the trenches across a mind-numbing array of job duties. These duties shifted as the business grew.

Duties at Merus
2008-2014: The first $1 million in ARR
Startup Nuts & Bolts

Responsible for all direct hires, monitoring cash flow, negotiating leased office space, establishing procedures for HR, benefits, salaries, payroll, mentorship, accounting, and regulatory compliance. Procured the physical tools of the trade – laptops, furniture, phones, internet services, bank accounts, accounting software, source control, etc. This encompassed everything from installing Asterisk (VoIP PBX) to negotiating with HMOs, and everything in between. In the days before co-working spaces, Github, and the Affordable Care Act, all of this had to be done by hand.

Defining Vision, Mission, and Product

Established infrastructure on AWS (before point-and-click, one had to roll their own linux build), architected a Single Page Application framework (backbone didn't exist yet, much less Angular or React, yet MerusCase employed data binding with a Shadow DOM as early as 2009), and established software patterns for API consumption, JavaScript-based routing and history management, compartmentalization of cache management, per-client preference-driven customizations and ACLs, and a heightened level of security (e.g., per-client SALTs) for safe and compliant storage of confidential Patient Health Information under HIPAA. The MerusCase homegrown JavaScript framework would eventually adopt a react-like framework (i.e., instantaneous redraw of DOM based on underlying data updates), with specific accommodations for our unique needs, e.g., sorting and filtering of tens of thousands of data records in the browser (JavaScript) without server interactions.

Sales & Marketing

Hands-on relationship-based selling led to the first 100 clients and first set of lucrative partnerships. This entailed active outbound efforts, both cold and lightly lukewarm, trade shows, content-based inbound efforts, and physically knocking on doors.

2015-2019: Scaling up
As Principal Engineer, led an effort to modernize both the look and feel of the MerusCase application and lay the groundwork for additional scale, including repayment of technical debt. Added object storage schemes to achieve infinite scale in a number of key areas, including document and email storage and to facilitate free text search (ElasticSearch for instant search capabilities across 10+ billion objects). Rearchitected major portions of the relational database for both speed and scale, denormalizing certain aspects to facilitate ease of access while simultaneously opting in to an "everything data-driven" philosophy for on-the-fly customization on an as-needed, per-client basis. Queueing services were expanded upon, offloading background tasks from application servers and distributing across various geographies and platforms, especially for document processing, image generation, and reporting tasks.

Continuous Integration across all products and deployments was formally implemented during this period, encompassing functional unit tests, various levels of User Acceptance testing and improved infrastructure allowing for a staggered upgrade and deployment scheme, with granular per-client upgrade capabilities. Technologies used included CircleCI, PHPUnit, and Selenium, in addition to a suite of homegrown utilities: screen capture analysis for DOM and UX issues, spell check, link validation, W3C compliant markup, etc.

From a leadership perspective, the team sized doubled to 20, including key help in the C suite and additional oversight in engineering. The MerusCase brand enjoyed a position as the standard for Workers Compensation law firms in California, fostering a meritocratic culture of success as the engineering-centric startup grew to include dedicated personnel in sales, marketing, support, and professional services. The prosperity enabled us to formalize our incentivized stock option plan, sponsor a generous employer-funded 401K plan for all employees, and expand health care coverage options.

Sybase/iAnywhere (formerly AvantGo Inc.) | Dublin, California
System Architect/Consultant, iAnywhere Worldwide Client Services   2001-2007

Responsible for managing technical consulting projects from proposal to delivery. This entails leading project teams both in technical and administrative functions, managing customer resources and expectations while adhering to scheduling and budgetary constraints.

High profile projects included applications for Ford Motor Company, Pfizer, McKesson, Avaya, Baxter Healthcare, AmerisourceBergen, and Eli Lilly & Co.

Projects included mobilization of various applications, including back-end technologies based on Siebel, SalesForce.com, and custom client applications.

Application functionality encompassed field service, customer relationship management, sales force automation, quality control/inspection, and delivery verification.

Director, AvantGo Worldwide Technical Support   1999-2001

Grew customer care organization from startup phase servicing less than a dozen enterprise customers to several hundred, engaged in all aspects of post-sales customer interaction. Technical support team was grown from zero employees to eight over a two-year period, supporting sales growth beginning with less than $1 million annually to over $30 million.

MusicRip | Dublin, California
Founder/Entrepreneur (Side Hustle)   2004-2005

Founded and originated all aspects of technology service business focused on digital music management. MusicRip was founded on a shoestring budget and immediately profitable. The business grossed over $30K in revenue in the initial six months of operation and was sold in early 2005.

Business operations management included all aspects of organizational birth. MusicRip was built as a customer-focused concern. Handled immediate business requirements such as accounting, cash flow management in line with strict budgetary guidelines, hiring of contractors, establishment of customer service policies, client management, consumer- based web sales, commercial account telesales, shipping and receiving procedures, branding and market positioning, competitive analysis, advertising procurement, return on investment analysis, and opportunities for growth.

Included development of functional online presence that was customer-friendly, informative, search-engine optimized, and allowed for immediate online purchasing. Created custom internal CRM and ordering system with ties to online storefront.

Authored algorithms for cataloging and managing digital music in various formats, including MP3, AAC, WMA, and FLAC, incorporating a wide range of customizations on quality, such as encoding, tagging, archiving, and pricing for resale in both real-time and batch mode. Built a streamlined digital audio production system from off-the-shelf commodity hardware. Distributed system had ten terabytes of redundant online storage capacity and was capable of ripping 192 CDs per hour.

Heuristic Search Inc. | San Jose, California
IT Manager/System Administrator   1998-1999

Managed all network and system functions for national human resources management firm. This included implementation and management of a VPN-based WAN, a custom internal customer and candidate management system, accounting and payroll automation tools, and various IT infrastructure components, including security

systems, web, email, database, and backup. Administrative functions included IT purchasing and budget management, contract negotiation including ancillary telecom services, and monitoring and preventing abuse of corporate IT and telecom resources.

Shaman Pharmaceuticals | South San Francisco, California
Desktop and User Support Coordinator, 1997-1998

Hands-on technical coordinator supporting all desktop and mobile systems, including hardware and software recommendation, purchase, configuration, deployment, and maintenance. Responsible for inventory of all IT related equipment, including establishment of record keeping methodology. Assisted heavily in network administration (heterogeneous Windows NT/Novell Netware/Mac OS environment) and management functions, including policy establishment, documentation of internal systems, backups, user account administration, and physical wiring.

Aquent Inc. | Various Locations, California
Information Technology Consultant/Graphic Designer & Prepress Specialist   1997

Supported clients as a contract employee in various industries including banking, manufacturing, pharmaceutical, and publishing. Led to position at Shaman Pharmaceuticals.

Kinko's Inc. | San Ramon, California
Computer Services Manager   1995-1997

Management position supervising staff of four. Responsibilities included network administration and desktop support in addition to layout, design, and digital output services.