

David W. Porter, CPA, CMA, CGMA

Extensive general management, operations, accounting, finance, human resources, process improvement and change leadership experience in companies from \$4M to \$3.1B in revenue. Strengths include a unique blend of technical skills and straight-talk leadership with a talent for coaching executives and emerging leaders; delivering results through processes and people; and building high-performance businesses.

Core competencies include:

Leadership effectiveness

Human resources

Executive coaching

Accounting/FP&A

Business process improvement

Change management

WORK HISTORY

David Porter Advisors San Antonio, TX

An executive coaching and advisory firm with clients ranging from \$40M to \$1.2B in revenue in multiple industries.

Founder and CEO (12/2016 — Present)

- Focus is change management, executive communication, and rapid decision making at C-level

YouGov America, Inc. Redwood City, CA

11/2012 – 11/2016

A wholly-owned subsidiary of UK-based public company YouGov plc, delivering custom market research, polling and branded syndicated products to the US market.

General Manager and CFO (5/2015 — 11/2016)

- Following departure of US CEO, added the GM role to existing responsibilities
- Established and exceeded growth targets for revenue and profit in FY16
- Opened San Francisco and Washington, D.C. offices to capitalize on brand awareness driven by 2016 election
- Directed expansion of highest-profit custom offering, increasing profits by \$1M YOY
- Reduced overhead expenses by \$2M by consolidating leadership structure and focusing on mission-critical activities
- Established benchmark processes in survey services, used as global template
- Coached employees at all levels to support their individual development and build bench strength

CFO (11/2012—5/2015)

- Consolidated accounting operations from three systems and offices into single system and office with centralized billing and cash management in first six months
- Assumed US survey and panel operations leadership, implemented a centralized process in first thirty days, increased internal client satisfaction, improved project turnaround time and increased gross margins by three points in the first year
- Introduced professional HR processes and leadership to the US for 130 employees, systematizing payroll, employee relations, recruiting and benefits processes
- Negotiated reduction in healthcare costs without reduction in benefits

Comvest Capital West Palm Beach, FL**1/2010 – 10/2012**

Comvest Capital, a private equity firm based in West Palm Beach, Florida, has invested over \$2B in more than 200 public and private companies.

COO/CFO (Operating Companies)

- Translated experience in small and large companies into C-level roles in laser manufacturing and online learning companies as COO and CFO extending company life cycles to prove market viability and maximize investment returns
- Led turn around of \$200K/month negative cash flow online industrial education company to generate positive cash flow and successful exit in eighteen months

Harland Clarke Holdings Corp., San Antonio, TX**3/2003 – 6/2009**

A \$1.8B revenue financial services and educational testing company owned by M&F Worldwide

Scantron Corporation, Eagan, MN**3/2009 – 6/2009**

\$225M revenue firm providing data collection, testing and assessment products and services sold primarily to educational and commercial customers

President

- Stepped in after CEO departure to establish organizational design and business process rigor during transition to President with significant education sector experience
- Provided interim leadership, advanced organizational redesign, and accelerated ERP system implementation

Harland Clarke Corp., San Antonio, TX**1/2007 – 3/2009****Senior Vice President Human Resources**

Led all Human Resource and performance excellence activities

- Focused on achieving merger synergies; synergy targets of \$112M met six months earlier than planned
- Coached C-level leaders to ensure their capabilities aligned with the expanded responsibilities required to deliver financial results
- Developed and led enhanced processes to integrate two companies with 6,000 employees and over 80 years of head-to-head competition
 - Built a talent management process and led performance excellence and communications processes
 - Directed completion and rollout of a new leadership development program
 - Expanded diversity management competency, invested in full-time resources, and significantly accelerated the organization's awareness and understanding of diversity and inclusion
 - Implemented an enhanced succession planning process and automated the recruiting processes, reducing hiring cycle time by more than 50% and improving candidate quality

Checks In The Mail, Inc., New Braunfels, TX**5/2006 – 1/2007**

Leading direct marketer and supplier of bank checks and related supplies; the direct-to-consumer segment of Clarke American Corp. (Promoted to the parent company to lead HR, performance excellence and change management efforts driven by pending merger.)

Vice President/General Manager

Profitably grew revenues in a declining market.

- Sales performance and profit growth exceeded that of two larger competitors with profitability records set in each quarter
- Introduced talent management and succession planning processes to build leadership bench strength

Clarke American Checks, Inc., San Antonio, TX**8/2005 – 5/2006**

\$550M revenue provider of checks and related products and direct marketing services for financial institutions and direct to consumer segments. 2001 Malcolm Baldrige recipient.

Vice President Human Resources and Performance Excellence

- Redesigned and streamlined Performance Excellence process as part of the transition to a public company
- Simplified project commissioning and management, goal development and deployment processes and team excellence processes, reducing planning time by more than 50% from prior year
- Led implementation of employee retention program and revamping of Talent Management and Succession Planning processes. Identified high potentials and leveraged their talent for key company projects
- Coached C-level and emerging leaders in management and leadership skills

Checks In The Mail, Inc., New Braunfels, TX

3/2003 – 8/2005

Subsidiary of Harland Clarke and \$100M revenue direct marketer of personal and business checks

SVP Finance, Human Resources, and Performance Excellence

3/2003 – 8/2005

- Responsible for all accounting, finance, HR and performance excellence processes
- Led Performance Excellence process using the Malcolm Baldrige criteria; applied for the Texas Award for Performance Excellence, resulting in a first-year site visit
- Expanded L&D offerings to include executive coaching and communication program offerings to enhance skill sets and improve management and employee communication
- Introduced a workforce planning process to emphasize key talent engagement and retention, redeployment of resources, and career opportunity program. As a result, turnover rates decreased 10 points.
- Introduced an outcome-based thinking model to data entry personnel to enable process improvement. Improved productivity by 50% over a two-year period

Cessna Aircraft Company, Wichita KS

2/1998- 3/2003

A \$3 billion aerospace market leader, world's largest manufacturer of general aviation aircraft and a **Textron, Inc.** division.

Vice President, Organizational Effectiveness

10/2002 – 3/2003

- Led a Textron-wide team to improve Learning and Development processes by creating the infrastructure for a centralized system targeting \$2.5M in cost reduction per year
- Introduced a workforce planning process to enhance key talent engagement and retention in the 1,000-employee engineering group
- Deployed HR consultants to core processes to improve HR customer service, expanding business partnering with the Senior Leadership Team

Vice President, Business Process

11/2001 – 10/2002

Tasked by the CEO to lead Cessna's transformation to a customer-focused and process-driven enterprise

- Created, facilitated and led a core team and three design teams in redesigning several core customer processes
 - Order Fulfillment team identified over \$200 million in hidden factory costs and developed a long-term redesign to eliminate \$100 million of those costs in five years
 - Initial Order Acquisition redesign reduced customer response time by 70%
 - The team developed and deployed:
 - Company-wide communication process to expand employee and customer connection and satisfaction
 - An enterprise-wide change management process founded on hands-on experiential training for 4,000 employees. Engaged employees and allowed effective implementation of Six Sigma program.
- Led employee suggestion program with first-year savings of \$5 million

Director, Business Process

9/2000 – 11/2001

Director, Parts, Service and Customer Accounting

2/1998 – 9/2000

- Led 65-member team responsible for Customer accounting, Citation Service Center accounting (\$200M sales) in nine U.S. locations and Paris, France, as well as Parts Distribution accounting in the U.S. and Brussels (\$200M sales)

A D D I T I O N A L E X P E R I E N C E

Bombardier Corporation, Melbourne, FL/Benton, IL, Manager & Director Finance & Administration 1990 – 1998

The Bubble Room Restaurants, Maitland FL, Director, Corporate Accounting, 1987 – 1990

Coopers & Lybrand, CPA's, Punta Gorda FL / Jacksonville FL, Advanced Staff Accountant, 1985 – 1987

E D U C A T I O N

BS Accounting, University of Florida, Gainesville, FL

Leadership for Extraordinary Performance, Darden School of Business, University of Virginia

C E R T I F I C A T I O N S A N D A F F I L I A T I O N S

Certified Public Accountant—Florida

Certified Global Management Accountant

Certified Management Accountant—Institute of Certified Management Accountants

Certificate in Process Mastery—Michael Hammer and Company

Member, American Institute of CPAs & Florida Institute of CPAs

Texas Award for Performance Excellence Examiner, 2004-2008

Malcolm Baldrige National Quality Award Examiner, 2006