

Joseph W. Gonsalves II

PROFESSIONAL EXPERIENCE

CLICKMETER, San Francisco, CA

2014 to 2016

Director - Customer Success (Outside Remote Consultant)

- Executed all client facing responsibilities as the only point of contact in North America (70% of customers based in N.A.) for Rome, Italy based early stage B2B SaaS analytics startup
- On-boarded new customers and worked with them to identify their unique advertising needs, vision, business requirements and use cases to help translate those into reality with ClickMeter
- Provided consultation and education across the management stack on the overall product features (dashboard UI & API integration), metrics and usage to gain the most value and ROI
- Facilitated communication between our customers and internal product, marketing, engineering and leadership teams using Zendesk, Intercom, Trello and Slack
- Increased adoption and retention while reducing churn, upsell existing premium customers and close new enterprise level accounts
- Performed detailed analysis on customer behavior to improve organic growth and the lifetime value of our customers
- Presented ClickMeter to senior level decision makers visiting the San Francisco shared work space office

PAYAIR US LLC, New York, NY

2013 to 2013

Director - Client Development

- On-boarded and managed 25+ customers for early stage mobile payment start-up
- Contributed to sales cycle as a product specialist identifying specific pain points Payair US LLC could address
- Lead efforts in arranging discussions with senior level management at market leading brick and mortar retailers as well as potential strategic partners
- Generated with limited resources support collateral, printed materials, e-communications & authored a white paper

RADAR LOGIC INCORPORATED, New York, NY

2010 to 2013

Director - Client Development

- Executed the strategy for the development of the RPX derivative market for an early stage start-up real estate data & analytics company
- Investigated, interviewed and researched portfolio management and trading strategies for residential real estate capital markets to identify potential opportunities and use cases for RPX derivatives
- Produced and executed product marketing strategies with limited resources to educate clients on the value of RPX data & analytics as well as our listed and Over-The-Counter (OTC) property derivatives
- Elicited commitments from 50+ senior level department heads from hedge funds, private equity and investment banks to participate in the RPX derivatives market

THE BRIDGE CORPORATION, GRAMERCY AUCTIONS, Fort Lee, NJ

2009 to 2010

Director - Auction Services

- Oversaw the acquisition & disposition of auction portfolios for an early stage real estate auction start-up
- Cultivated partnerships with banks, servicers & funds to help assist in the disposition of national real estate portfolios
- Negotiated with banks, agencies and funds on property reserves as well as accepted bids at auctions on behalf of buyers
- Developed and managed national third party vendor relationships with local auctioneers, security, field services and real estate agents

BANK OF AMERICA / ABN AMRO LASALLE BANK, Chicago, IL
Assistant Vice President – Real Estate Capital Markets (CMBS)

2005 to 2008

- Originated, structured, negotiated, and underwrote loans on income producing commercial real estate
- Created and analyzed discounted cash flow models, financial statements, property cash flows, rent rolls, leases, legal documents, and due diligence packages for Loan Committee Proposals (LCP)
- Defended loan underwriting and structure to internal credit committee as well as investors (B-Buyers)
- Managed and oversaw deal flow for a team of six analysts. Avg. deal size \$2.3mm, department annual production in excess of \$1bn
- Managed a portfolio of national client relationships for multiple senior originators

ZACKS INVESTMENT RESEARCH, Chicago, IL
Account Executive – Zacks Investment Management

2004 to 2005

- Contacted warm leads regarding its online investment research tool, ZacksElite.com
- Required a strong knowledge of Zacks quantitative ranking model, equity capital markets and investment management
- Contributed to the continuing education of the account executive team
- Communicated complex ideas in a simple and straightforward manner that clients could understand

COWAN FINANCIAL GROUP / LENNOX ADVISORS, New York, NY
Investment Analyst – Investment Management

2002 to 2004

- Supported three managing directors in all aspects of their investment business. Increased assets under management by 100% during my tenure
- Created and managed relationships with third-party vendors, large scale money managers, high-net worth clients, compliance and internal insurance counterparts
- Provided strategic asset allocation recommendations and portfolio models based on the clients current holdings, risk tolerance and time horizon
- Executed trades and investment contracts on behalf of our high-net worth clients

GOLDMAN SACHS, New York, NY
Transaction Analyst – Global Treasury Operations

2000 to 2001

- Reviewed and confirmed the accuracy of monetary transfers for Goldman Sachs and its high net-worth clients. On a typical day an analyst would move \$1,000,000,000 worldwide
- Trained on all funds transfer systems, FED WIRE, SWIFT, and CHIPS
- Built and maintained relationships with internal sales assistants across all profit centers of Goldman Sachs as well as with contacts at outside financial institutions
- Educated sales assistants and payment creators on industry standards

EDUCATION

PLATTSBURGH STATE UNIVERSITY, Plattsburgh, NY

1998 to 2000

- Graduated Bachelors of Science: Marketing

SUNY CLINTON, Plattsburgh, NY

1996 to 1998

- Graduated Associate of Applied Science: Business Administration

LICENSES & CERTIFICATIONS

- Salesforce Trailhead: *CRM Essentials, Admin Beginner* **2016**
- Facebook Blueprint **2016**
- Google Adwords **2013 to 2017**
- FINRA Series 7 **2002 to 2007**
- FINRA Series 63 **2002 to 2007**