

# JOE GUZIK

703.300.5086 • Arlington, VA • joseph.guzik@gmail.com • linkedin.com/in/josephguzik

## PROFILE

A dynamic finance leader with 16+ years' experience driving change and scaling financial processes. Proven ability to communicate complex financial insights and automate models for strategic decision-making. Results-oriented and highly collaborative, I possess a natural ability to influence and inspire others.

## EXPERTISE

- Financial Strategy Development
- Spreadsheet Champion - Modeling & Forecasting
- Compensation Planning, Cash and Equity (*Carta*)
- KPI Reporting & Data Viz/Dashboarding (*Tableau*)
- GTM Strategy and Financial Execution
- Systems Guru (*Adaptive, Anaplan, Netsuite, Workday*)
- CXO, Board, and Investor Reporting
- Team and Cross-Functional Leadership

## PROFESSIONAL EXPERIENCE

### Reify Health

*Boston, MA - SaaS - clinical trial tech company, Series D (\$221 million), 800+ employees, ~\$106 million ARR.*

#### Director, FP&A

*2023 - Current*

I lead FP&A at OneStudyTeam, the SaaS arm of Reify Health, where I spearhead strategic financial planning, budgeting, forecasting, and key functions like revenue recognition, cash management, board and investor reporting, and equity management. This pivotal role allows me to propel the dynamic growth of the company.

- Initiated a comprehensive overhaul of the company's financial reporting, utilizing a new Netsuite system to forecast a complete three-statement financial model.
- Spearheaded a transformative overhaul of the annual budget planning cycle, recognized by the founders and executive team as a pivotal turning point for the company.
- Revamped commission plans, aligned with overhauled GTM strategy; orchestrated streamlined forecasting.
- Successfully steered the company towards cash flow positivity in collaboration with the executive team.
- Oversaw the administration of the company's equity program, managing the entire lifecycle of option grants in Carta to ensure effective and compliant equity management.
- Directed quarterly board financial reporting, offering transparent insights into bookings, revenue, cash, and the roadmap to profitability.

### Highspot

*Seattle, WA - SaaS - sales enablement platform, Series F (\$248 million), 1,000+ employees, ~\$160 million ARR.*

#### Sr. Manager, FP&A

*2022 - 2023*

Served as head of finance in support of Highspot's G&A organization, leading one direct report. Responsible for the organization's annual budget, multi-year financial strategic plan, and ongoing forecasting process, reporting, and execution of FP&A strategy.

- Developed the company's long range financial plan, forecasting key financial KPIs such as ARR, revenue, gross margin, headcount, as well as the income statement, balance sheet, and cash flow
- Served as a cross-functional leader on multi-year public-company readiness budgeting and planning
- Lead compensation planning (cash and equity) for over 1,000 employees, inclusive of budgeting, defining eligibility and recommendations, analyzing benchmark data, and guiding leaders through the review cycle
- Developed automated equity models that forecasted burn, valuation, and provided grant guidance

# JOE GUZIK

703.300.5086 • Arlington, VA • joseph.guzik@gmail.com • linkedin.com/in/josephguzik

## PROFESSIONAL EXPERIENCE (Cont.)

- Improved monthly review process through the development of standardized and automated reporting, reducing prep time by 3 days
- Owned quarterly board financial reporting as well as insights on attrition, diversity, and recruiting efforts.

### EVERFI

Washington DC - SaaS - EduTech platform, acquired by Blackbaud for \$750 million, 1,000+ employees, ~\$100 million ARR.

#### Sr. Manager, FP&A

2020 - 2022

Served as the head of FP&A at EVERFI, leading two direct reports as strategic financial business partners to GTM, R&D, and G&A orgs. Responsible for the company's annual budget and forecasting process, inclusive of income statement, balance sheet, and cash flow statement.

- Successfully navigated FP&A team through two transactions within 6 months: a \$100M sale of EVERFI's higher education vertical and the \$750M acquisition by Blackbaud (7.5x multiplier)
- Re-built and automated aging financial models for ARR, revenue, COGs, OpEx, headcount, balance sheet, and cash flow allowing rapid insights into variances and self-service capabilities for finance leaders
- Lead and participated in due diligence and fundraising requests, to include: quality of earnings asks, long range financial modeling, pro-forma analysis and KPI reporting
- Lead CFO organizational OKR/goal setting and developed dashboard providing insights to executive team

### SAP Concur

McLean, VA - SaaS - T&E management solution, acquired by SAP for \$8.3 billion, ~4,600 employees, >\$1 billion ARR.

#### Manager, FP&A | Concur Product and Engineering

2017 - 2020

#### Sr. Financial Analyst | Concur Distribution and Corporate Marketing

2015 - 2017

#### Financial Analyst | Concur Government

2013 - 2014

- Led post-acquisition hand-off of FP&A from startup acquisitions Triplt and Hipmunk
- Analyzed and incorporated intricate consumer travel trends using BI tool developed in-house at Hipmunk; collaborate closely with sales and marketing teams to improve forecast accuracy
- Reconciled over \$1 million in marketing program spend variance to budget, improving the organization's confidence in the usage of their budget as well as critical KPIs like CAC and program ROI.
- Led adoption of Smartsheet to collaboratively tack program marketing spend across the business
- Spearheaded financial support for a 15 year, \$1.5 billion contract, supporting over 90 federal agencies.
- Led commission planning, handling models, calculations, forecasting, and payment reconciliation.

#### CNA Corporation | Project Control Analyst

2011-2013

#### BAE Systems | Program Financial Analyst > Lead Program Financial Analyst

2009-2011

#### ManTech International | Program Management Support Intern

2008-2009

## EDUCATION

**BSBA, Finance** - Christopher Newport Univ. (2009)

## CERTIFICATIONS

**Project Management Professional** - PMI (2011)