



POSITION DESCRIPTION

TITLE: CHIEF OPERATING OFFICER

ORGANIZATION: PEER GROUP PROFESSIONAL ORGANIZATION

Our client connects professionals to exchange knowledge and distills insight to advance them and their profession. Founded in 1994, our current niche is connecting treasury and finance professionals at large corporations and regional banks, but our model can be applied to any professional discipline. We connect people primarily via membership peer groups that meet face-to-face twice per year, regular virtual meetings for peer groups, working groups and topics of interest across groups; via an on-line community; and through concierge introductions based on our knowledge and data profiles of each participant in our network. We expect to continue to grow our network by adding new verticals, training and talent development, plus bringing the model to financial sponsors (private equity and venture) for their portfolio companies and financial and professional service firms for their clients through our offering. Altogether, our network includes 1,000+member professionals from over 300 organizations including the world's largest mega-cap companies. Our members are primarily in the US, but also Europe, Latin America and Asia. Knowledge exchange with these professionals supported by our research puts us in a unique position to distill insight and best practices with them and generate valuable content, while also informing subsequent connections and exchanges. This virtuous circle serves to attract more people to connect and contribute to our knowledge exchange; it will also generate additional revenues from customers who pay to receive the insight distilled from knowledge exchange across our network. Content and the diversification of our platform to connect professionals to share and learn, train each other and develop their talent will drive our growth.

We are seeking a Chief Operating Officer (COO) to lead and direct our leadership team, focusing on sales and marketing, meeting facilitation, programming operations, event planning, content delivery, HR and financial management; plus, help us execute a digital transformation to more effectively support our stakeholders and focus on the customer journey. The COO position was established to free up our founder and CEO to serve in the role of visionary and create the strategy for growing revenues. In the next phase, we are looking for a C-level executive who can drive growth by shaping sales strategy, improving customer acquisition, and marketing leverage while also continuing to improve operational performance to increase profitability and enterprise value. You will also guide the firm toward a potential exit or implementation of a leadership team capable of building the company for the next generation.

As a prospective candidate, you are expected to carefully read this job description and eliminate yourself from the candidate pool if the duties and responsibilities are not a good match for you.

DESCRIPTION:

In this role, you will work with the founder and CEO to develop and execute the strategic plan to achieve revenue and profitability goals. You will develop with each team member their role in the plan, their objectives and their individual KPI/MBO components. You will work with each team member to set their target goals and work with them as a coach to maximize their potential to reach them.

This position will be remote with the expectation that the person be able to travel to company meetings in New York once per month. Some travel to the following locations may be required to adequately learn the business: New York City, Silicon Valley, Europe or Asia.



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DUTIES AND RESPONSIBILITIES:

As a key member of the senior management team the COO will:

- Develop and implement a comprehensive revenue growth strategy.
- Identify new market opportunities and revenue streams.
- Optimize pricing models and monetization strategies.
- Oversee revenue forecasting and financial performance analysis.
- Manage and scale the sales organization to drive revenue targets.
- Define and refine sales processes, methodologies, and KPIs.
- Foster a data-driven sales culture with clear performance metrics.
- Build strong relationships with key clients and strategic partners.
- Align marketing strategies with revenue objectives.
- Oversee lead generation, brand positioning, and digital marketing efforts.
- Ensure marketing and sales alignment to optimize conversion rates.
- Improve customer lifetime value (LTV) through strong retention strategies.
- Oversee customer onboarding, engagement, and satisfaction initiatives.
- Implement data-driven customer success metrics and processes.
- Collaborate with product, finance, and operations teams to align business objectives.
- Provide executive leadership on revenue-related decisions.
- Serve as a key advisor to the CEO on revenue growth initiatives.
- Establish a regular reporting framework using scorecards and dashboards to monitor progress across all teams and team members.
- Be the coordinator of the leadership team to integrate this reporting framework and present them to the CEO and other company leadership.
- Promote accountability and priority-setting in line with the company plan and uphold company values.
- Both embrace and live the company values to lead by example.
- Improve the business processes for each department through analysis and collaboration.
- Serve as a filter for decisions and issues before they are escalated to the CEO to determine if they can be resolved without him.
- Work with the CEO to address such issues that need to be escalated when targets are not met and recommend a resolution plan.
- Performs other duties as required.

POSITION REQUIREMENTS AND QUALIFICATIONS:

- Must be self-directed, self-reliant, decisive and have demonstrated good planning and organization skills, including experience writing budgets and business plans.
- Must be a strong leader capable of achieving good team cohesion.
- Must possess strong management skills and be good at managing people. Work and communicate effectively with all levels of personnel, from management to front line staff.
- Possess experience and success with conflict resolution.
- A mindset focused on increasing revenue, business development, and increased margins.
- Experience and proven success in identifying, attracting, recruiting, and hiring A-list talent. Talent acquisition.
- Experience and success creating and implementing employee compensation plans that incent employee efforts and reduce employee turnover.



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- Natural willingness to communicate regularly with management and staff, and to be transparent and share information.
- You should demonstrate that you are a successful coach, and a good evaluator and developer of talent.
- Possess a proven history of success in achieving organizational goals.
- Ability to multi-task and set priorities.
- Ability and success meeting project timelines.
- Record of measurable achievements and accomplishments.
- 10+ years of leadership experience, ideally with a track record of bringing firms from \$7mn to \$10-20mn in sales.
- Resilient, adaptable and a good conceptual thinker.
- High energy level. Strong personal drive and ability to energize others.
- Strong organizational skills. Detail-oriented. Does not allow details to slip through the cracks.
- Forward thinking and proactive vs. reactive.
- A problem solver and a persuasive leader.
- You should be familiar with technology project management to improve our digital platform.
- Familiarity with CRM, marketing automation, and revenue analytics tools.
- Experience in membership/recurring revenue business preferred.

EDUCATION: Bachelor's degree. Advanced degree preferred.

COMPENSATION: A generous compensation package, including salary commensurate with experience, plus incentives based on company performance and gains under your management, will be offered. Benefits include a health plan and 401k.

FOR ADDITIONAL INFORMATION, PLEASE CONTACT:

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