

Dean Lee

Product & Marketing

SUMMARY

I'm a self-starter with 15+ years of hands-on experience in go-to-market, product and marketing strategy. My background is a combination of startup experience and multi-channel marketing support for clients – both in the B2B and consumer worlds. As a martech specialist, I help clients with marketing automation, including lead flow routing, drip sequences and performance tracking. I'm well versed in optimizing campaigns and demand generation activities using a variety of CRM's, marketing engagement platforms and tools for project planning, A/B testing, integration and performance tracking.



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EXPERIENCE

Product Management and Marketing Consultant

Over-C Inc. / San Francisco, Los Angeles & New York / Nov. 2012 – Present

Advise and support clients in their go-to-market strategies, multi-channel marketing initiatives and product development efforts. Activities include:

- Developing and executing marketing, communications and go-to-market plans for B2B and B2C seed-stage startups and well-funded companies
- Crafting position statements and compelling narratives for story pitches
- Segmenting audiences to satisfy stakeholders (corporate impact, customer impact, investor interests, talent acquisition, etc.)
- Combining CRM and marketing automation tools to build content marketing and demand generation drip campaigns, including:
 - Keyword planning for SEO / SEM / PPC / Paid Search
 - Copywriting
 - Producing creative assets
 - Developing responsive Websites
 - Designing lead capture landing pages
 - A/B testing
 - Email marketing
 - Editorial planning for social media content
 - Defining key performance indicators (KPIs) to measure results
- Assembling presentation slide decks for investors and business development pitches
- Creating online and print collateral such as infographics, one-pagers, data sheets, fact sheets, sell sheets, brochures and tri-folds
- Launching products including managing development lifecycles, roadmaps and releases, and designing subscription pricing plans
- Serving as a cross-functional liaison by coordinating between business and engineering units to translate technical talk to layman language
- Presenting to C-level executives and key stakeholders

SKILLS

- Marketing Automation
- Digital Marketing
- Product Marketing
- Campaign Management
- Product Management
- Project Management
- Planning & Organization
- Oral & Written Communication

EDUCATION

B.S. in Business Administration

Drexel University / Philadelphia, PA
1996 - 2000 / Cum Laude

PROFICIENCIES

- Salesforce
- HubSpot
- Pardot
- Iterable
- Klaviyo
- Ontraport
- Airtable
- MailChimp
- SendGrid
- Zoho
- Airship
- Slate
- Unbounce
- Google Analytics
- Google Tag Manager
- WordPress
- HTML / CSS
- Adobe Photoshop
- Adobe Illustrator
- Adobe Premiere
- Microsoft Excel
- Microsoft PowerPoint
- Microsoft Word
- Microsoft Outlook
- Stripe
- Intercom
- Slack
- Monday
- Asana
- Trello
- Basecamp
- Hootsuite
- Sprout Social
- ZoomInfo
- Zapier
- Veeva
- Adobe Workfront

EXPERIENCE CONTINUED

Co-Founder, Chief Marketing Officer and Head of Product

Tweetalicious Inc. / Philadelphia, PA / May 2011 – Oct. 2012

Drove the marketing strategies and guided product development for a new category of products aimed at connecting consumers with brands.

- Brought to market Tweetalicious – a shopping discovery engine on Twitter that was available via the Web and as iPhone and Android apps – as well as Mosaic – a social scrapbook of curated fashion and entertainment content
- Led the PR, corporate communications and social media strategies to drive acquisitions, partnerships and influencer relationships with fashion bloggers, brands and retailers
- Conducted media briefings and served as company spokesperson which led to coverage in Mashable, InStyle and Marie Claire
- Developed brand identity and created high-impact presentations and marketing collateral which follow visual identity style guide
- Coordinated timing between product pipeline and marketing initiatives
- Managed multiple technology projects involving in-house and outsourced development resources – both domestic and off-shore
- Oversaw user experience (UX) design for Web, media tablet and mobile (iOS and Android) applications

Interim Director

Hydrogen Healthcare Marketing Inc. / Philadelphia, PA / May 2008 – May 2011

Developed the overarching business model and guided the branding and marketing strategies for a life sciences marketing & advertising agency.

- Advised on business development and workflow processes in financial, accounting and administrative functions for starting a successful business
- Developed content and overseeing production of company Website and slide deck presentation
- Created a social media strategy to establish company as a thought leader in the healthcare marketing and healthcare technology space
- Built proposals and handled contract negotiations

Head of Product and Marketing Strategy

Intellicomm Inc. / May 1999 – May 2008

Led the marketing and branding strategies for Innoport – a Software-as-a-Service (SaaS) business communications suite – since its 1999 launch.

- Designed subscription-based monetization model to convert Innoport from free to pay service
- Decided on new product features, pricing strategy and timing of new feature releases
- Crafted compelling marketing messages and collateral, including data sheets, whitepapers, case studies and customer success stories

INTERESTS



Traveling



Music



Photography



Videography

CERTIFICATIONS

- HubSpot Marketing Software
- HubSpot Sales Software
- HubSpot Reporting

EXPERIENCE CONTINUED

- Wrote copy for Web pages, direct mail pieces, press releases and all other material as needed for awareness and lead generation campaigns
- Led search engine optimization (SEO), social media optimization (SMO) and PPC campaign activities
- Created content, layout and static and motion-graphic creative on Innoport Website
- Raised organic search positions through landing pages, meta tag elements, content optimization, link building and link buying
- Participated in forums, blogs and social networking communities to establish thought leadership and cultivate word-of-mouth
- Partnered with a leading PR agency to collaborate on pitch stories which have led to feature coverage on CNBC and media exposure in The Wall Street Journal, CNN.com, BusinessWeek and Entrepreneur's StartUps magazine
- Designed target marketing strategies by segmenting based on business size, vertical industries and horizontal markets
- Produced budgets and financial justification models for new programs, including cost-benefit, ROI and LTV
- Studied key conversion metrics (CTR, CPC, CPA, etc.) and Website traffic to assess ROI
- Wrote proof-of-concept documents and collaborated on technical specifications documents to introduce scalable, value-added Inn port features
- Served as traffic liaison between marketing and engineering units to balance business requirements against technology implications
- Served as point person for all C-level prospects and client relationships
- Led client projects through the entire software development lifecycle (SDLC) from the analysis phase to final roll-out
- Conducted thorough needs assessment analyses prior to recommending solutions
- Developed cost justification models to compare payback period and return on investment (ROI) between IT projects
- Wrote comprehensive proposals to outline business requirements, project scope, timelines and fees for client engagements
- Addressed risk and change management issues prior to implementation in order to ensure successful deployments
- Prioritized tasks and managed schedules accordingly to ensure budgets were in line and milestones and deadlines were being met
- Tracked and reported project progress, issues, and next steps to internal and client team members
- Applied global best practices and industry benchmarks to ascertain best-of-breed deliverables
- Identified workflow inefficiencies and recommended business process reengineering (BPR) approaches to clients for further productivity gains

Over-C Client Projects

Marketing Automation Consultant

TransVoyant / Alexandria, VA / Feb. 2023 – July 2024

With customers as Merck, McKesson, Motorola and Lockheed Martin, TransVoyant is an AI-driven planning, performance and prescription platform for optimizing complex supply chains.

- Maintained Salesforce and HubSpot instances and managed the integration between the two applications for marketing and sales enablement
- Developed custom fields for streamlining reporting and automation
- Creating SOPs for managing and cleansing the opportunity pipeline
- Set up layouts for teams and individual users
- Created dashboards for C-level and reports for sales managers for review during weekly growth meetings

Marketing Automation Consultant

Cogency Global / New York, NY / Sep. 2022 – Dec. 2023

Established in 1980, Cogency Global is a leading provider of nationwide and international registered agent, process agent, corporate and secured transaction services for all industries, including the nonprofit sector.

- Collectively with the internal marketing team and 3rd-party vendors for data migration, carried out integration needs between HubSpot, Pardot and Salesforce
- Utilized Zapier to connect HubSpot and Pardot form handlers via webhooks to pass across prospect data
- Setting up criteria to define profiles in Pardot and prepare for lead grading and scoring
- Leveraged Google Tag Manager (GTM) for adding code snippets to lead capture landing pages for implementing ZoomInfo's FormComplete tool
- Ensured that the lead scoring and grading models are updated in line with demand generation needs
- Built and managed CRM reports and dashboards

Marketing Automation Consultant

Sponsors for Educational Opportunity (SEO) / New York, NY / Apr. 2022 - Aug. 2024

For over 50 years, SEO has been an innovator in education, mentorship, peer-to-peer support, high standards, and networks to turn untapped potential into newfound greatness.

- Set up new HubSpot instance and connected Salesforce to sync data between standard and custom objects
- Defined the schema for custom objects in HubSpot
- Migrated data from Constant Contact and offline sources while maintaining data hygiene
- Recommended best practices and central governance for all email marketing
- Retooled process for accepting program applications to move the Tech Developer team from using SurveyMonkey Apply to employing HubSpot forms and automation workflows
- Developed email templates and branded modules for newsletters, events and announcements
- Trained key staff on 5 program teams plus 2 additional internal clients on using HubSpot for contact management, list segmentation, email deployment, A/B testing, workflow automation and reporting

Marketing Automation Consultant

Talkiatry / New York, NY / Mar. 2022 - Oct. 2022

Having completed a series A with \$37M raised to date, Talkiatry is a leading technology enabled mental healthcare provider that delivers high-quality psychiatric care, responsibly.

Over-C Client Projects

- Developed nurture drip series and carried out the workflow automation for prospective patient and referral partner audiences in HubSpot and active patients in Iterable
- Designed segmentation rules and nomenclature for defining target audiences
- Created a system diagram to understand relationships and interactions between patient data warehouses, marketing automation platforms, and patient support applications
- Established and maintained scalable processes that ensure best practices
- Leveraged data and cross-team collaboration to build scalable lifecycle marketing programs
- As a HIPAA-covered entity, the work was bound by a business associate agreement (BAA) to ensure protection of patient health information (PHI)

Email Marketing Consultant

Karat Financial / Los Angeles, CA / Mar. 2022 - May 2022

With \$45.6M raised to date, Karat offers business credit cards tailored to the needs of digital creators and influencers.

- Used warmup tools like Warmbox and Warmup Inbox to revive existing inboxes and domains and build the reputation of new inboxes and domains
- Configured DNS entries to set up new inboxes and domains with proper authentication protocols (SPF, DKIM, DMARC)
- Made recommendations for new strategies on email marketing performance
- Developed sales sequences in Outreach to maintain a 55% open rate and less than 1% bounce rate

Marketing Operations and Sales Operations Consultant

WhizAI / Somerset, NJ / Dec. 2021 - Sep. 2022

With \$20.2M in venture funding, WhizAI is the only AI-powered analytics platform purpose-built for life sciences and healthcare.

- Recommended and managed the marketing technology stack, which included HubSpot and the integration with the WhizAI website running on Webflow as well as the organization's Salesforce (SFDC) CRM instance
- Ensured marketing data from sources such as web forms, offline events and account-based marketing (ABM) campaigns was properly collected and connected with other systems
- Integrated Salesforce with ZoomInfo for lead enrichment and FrontSpin so SDRs could auto-dial prospect lists
- Set up and managed sales sequences in HubSpot with automated emails and follow-up tasks
- Established standard operating procedures (SOPs) to establish protocols, processes and best practices on data collection and privacy
- Developed strategy for analytics, reporting and dashboards to measure the effectiveness of each channel and the overall performance of the marketing program
- Created HTML email templates and custom modules employing the HubL tag to facilitate drag-and-drop emails
- Managed email marketing campaigns to seed lists and target audiences

Website Developer

Cardiac Dimensions / Kirkland, WA / Sep. 2021 - Dec. 2021

With a presence in NA, Europe and Australia, Cardiac Dimensions is on a mission to bring more success to the treatment of heart failure patients.

- Designed and developed the cardiacdimensions.com website with language selection for content in English and German
- Using WordPress as the CMS, developed dynamically generated sections to facilitate the entry of recent news, publications and studies

Over-C Client Projects

Marketing Operations and Sales Operations Consultant

CarePoint Health / Hudson County, NJ / June 2021 - Oct. 2022

Combining the resources of three area hospitals, Bayonne Medical Center, Christ Hospital in Jersey City, and Hoboken University Medical Center, CarePoint Health brings quality, patient-focused healthcare to Hudson County, New Jersey.

- Designed and developed the carepointhealth.org website using Elementor and WordPress, including the information architecture, branding elements, home page messaging and visual assets
- Designed and developed microsites including COVID Institute of NJ (<https://covidinstituteofnj.com/>) and Neuroscience Institute at Christ Hospital (<https://neuroscience-institute.carepointhealth.org/>)

Digital Marketing Consultant

Avalon Healthcare Solutions / Tampa, FL / June 2021 - Apr. 2022

Avalon generates actionable lab-driven insights in real-time to proactively ensure appropriate care and enhance clinical outcomes.

- Implemented SEO best practices during the website redesign and developed email marketing journeys in Mailchimp

Growth Marketing Consultant

Kanopy / Hudson County, NJ / Apr. 2021 - July 2021

Founded in 2008, Kanopy is an on-demand streaming video platform for public libraries, colleges and universities that offers films and documentaries.

- Designed growth marketing campaigns targeted towards kids by leveraging deep personalization on the Iterable email marketing platform in order to boost a side of the business that had flat-lined

Digital Marketing Consultant

UV Innovators / Cary, NC / Feb. 2021 - Aug. 2021

Acquired by WellAir Solutions, UV Innovators is the makers of NuvaWave, a portable, medical-grade UVC device for serious disinfection.

- Oversaw digital marketing activities, including maintenance of the WordPress website built on Elementor
- Developed an integrated strategy combining email marketing, organic and paid social and thought leadership to educate the market and drive public perception and awareness on the impact of pathogens

Faculty Communications Manager and Digital Marketing Specialist

Morehouse College / Atlanta, GA / Dec. 2020 - Mar. 2022

Morehouse College is a private historically black men's liberal arts college which is consistently ranked among the top HBCUs in the nation.

- Served as a liaison between the communications department and division chairs to address their marketing objectives
- Segmented the school population among students, parents and alumni in Slate and created email marketing campaigns for sending FAFSA announcements and open house events through Slate and Mailchimp
- Collaborated with admissions to develop drip content for nurturing leads through the prospective student journey
- Ran the social channels for the admissions department to engage with prospective and current students

Over-C Client Projects

Production Manager

Bristol Myers Squibb / Lawrenceville, NJ / Dec. 2020 – Dec. 2021

Bristol Myers Squibb (BMS) is a global pharmaceutical company headquartered in NYC with annual revenues of \$42.5 billion.

- Acting in a hybrid capacity as a digital marketing specialist, champion, marketing operations manager, and engagement planner on the hematology team to support marketing activities of the POMALYST, REVLIMID and Sprycel brands
- Managed creative design and production agencies to move projects of varying channel marketing tactics through the pipeline from kick-off to medical, legal, and regulatory (MLR) review
- Carried out lead nurturing programs using Salesforce Marketing Cloud (SFMC) and Adobe Experience Manager (AEM) by defining automation workflows for drip campaigns and creating dashboards for data visualization and analysis
- Cross-collaborated with key matrix partners on systems diagramming to improve process workflows, optimize operational efficiencies and measure output performance

Marketing Strategist and HubSpot Administrator

Zorroa (dba Boon AI) / Oakland, CA / Dec. 2020 - Sep. 2021

With \$9.2M in funding which included a \$7M seed round from Gradient Ventures, Boon AI was a machine learning integration platform aimed at media-driven organizations.

- Worked with the marketing team on the demand generation strategy with an action plan that included configuring campaigns, custom properties, segmentation and automation in HubSpot to effectively drive and nurture leads
- Involved in marketing planning meetings to understand aspects such as current tactics, drivers, messaging, metrics and approach
- Worked collaboratively with team members to develop a high-level action plan on short-term campaigns for going after low-hanging fruit and workflows for nurturing leads in the pipeline as well as longer term activities to concentrate on generating more leads and winning more opportunities

Digital Marketing Specialist

The Arcview Group / Oakland, CA / Aug. 2018 – Mar. 2021

The Arcview Group is a trusted name in the burgeoning cannabis industry, having helped more than 1,200 investors place \$230+ million behind 200 companies, and producing market research reports that are the #1 cited source in the space.

- Created audience segments, email campaigns, forms, promo offers and workflow sequences in Ontraport
- Supported the company migration from Ontraport to HubSpot Marketing Hub Enterprise for customer relationship management (CRM) by architecting the lead flow routing and drip campaign rules on the new platform
- Maintained all aspects of HubSpot including the design of sophisticated marketing automation workflows, segmentations and lists, chatflows and advanced contact, event registration, intake and survey forms
- Developed lead generating landing pages on behalf of the investor network to sell events, conferences and memberships as well as for the market research division to sell data reports
- Pitched media which led to publication in CNN as well as a Bloomberg article announcing a Hong Kong Investment Forum and Bloomberg covering the event under the Twitter account @tictoc with 434K followers

Performance Marketing Consultant

The Young Turks (TYT) / Los Angeles, CA / July 2018 – May 2020

With \$20 million series A raised, TYT Network is a progressive media company which has live-streamed hours of video content for a decade and gained over 17 million subscribers and 12 billion views.

Over-C Client Projects

- Supported the organization in performance marketing by setting up tracking through Google Tag Manager and Google Analytics and analyzing and interpreting Web and mobile metrics through the conversion funnel
- Combined tools such as Unbounce, Typeform, Klaviyo, Airship and Twilio to design drip campaign workflows for generating and nurturing leads, as well as for engagement, retention, sunseting and re-engagement sequences, by properly segmenting audiences for effective email marketing communication, push notifications and SMS
- Designed landing pages, email templates, pop-ups, sticky bars, petitions, polls and quizzes for integrated campaigns to grow email subscriber lists and support campaign contribution drives for donations
- Constructed advanced Trello boards with premium Power-ups to revamp the marketing and editorial planning calendars and provide visibility into projects in the pipeline across the organization
- Produced an assumption model for projecting key performance indicators (KPIs) such as customer acquisition cost (CAC), average revenue per account (ARPA) and customer lifetime value (CLV), as well as a churn analysis

Marketing Director

GlobeHealer / Philadelphia, PA / Sep. 2016 – Sep. 2018

Having raised \$2.5M in seed funding, GlobeHealer is building a decision-making application to solve critical issues in the global healthcare industry which over time, will create unique, rich, global patient data.

- Created the investor pitch presentation to prepare the company for their series A investment round
- Refreshed website, dashboard, messaging, pitch material and brand language as the company pivots into a multi-prong approach

Marketing Advisor

Opulen / Brooklyn, NY / July 2017 – Oct. 2017

Opulen is a Brooklyn, New York based company focused on generating community wealth through innovative blockchain solutions.

- Developed the brand identity, investor pitch book, website and launch strategy for their first initial coin offering (ICO)
- Assisted founders on the essentials of forming a business, including the startup documentation as well as setting up DNS configurations, email on Office 365, a business phone system using RingCentral and marketing automation tools

Marketing Consultant

Mallabo Communications / Savannah, GA / June 2016 – Aug. 2016

Mallabo Communications is an integrated marketing and public relations agency servicing startup and enterprise organizations.

- Collaborated on the marketing and communications plan for St. Clair County Community College

Marketing Consultant

Grey Matter Marketing / Santa Barbara & San Francisco, CA / Dec. 2014 – May 2016

Grey Matter Marketing is a healthcare marketing agency which builds brand stories of innovative medical device companies.

- Created and presented to stakeholders the entire marketing plan for ClearPop, the world's first OTC earache treatment for children with middle ear infection
- Performed a digital landscape audit for Transenterix's SurgiBot System, a minimally-invasive robotic surgical platform for laparoscopic surgery, and for USGI Medical who is seeking to launch the POSE procedure in the US; Standing for Primary Obesity Surgery Endolumenal, POSE is a non-surgical procedure for weight loss in moderately overweight individuals

Over-C Client Projects

Creative Director and Marketing Communications Specialist

InMoji / San Francisco, CA & Boston, MA / Aug. 2015 – Oct. 2015

Inmoji enables peer-to-peer monetization for messaging applications through in-message clickable icons called “Inmoji's.”

- Developed a one page promotional data sheet for pitching to brands
- Refined the app workflow and UI designs

Marketing Consultant

BitReserve (now Uphold) / San Francisco, CA / July 2015 – Oct. 2015

Handling over \$900M in transactions, Uphold is a FinTech company that enables anyone, anywhere to move, hold, convert and transact in any form of money or commodity instantly, securely and for free – on any device.

- Led the content marketing strategy for the US operations

Product Strategy and Marketing Consultant

RingMD / Singapore / May 2015 – Aug. 2015

RingMD is a telemedicine company with initial coverage throughout Southeast Asia.

- Created the go-to-market plan for penetrating the US market which covers the product, marketing and communications strategy
- Developed a series of infographics to explain the growth and benefits of telemedicine

Director of Digital Marketing

Prospira PainCare / Mountain View, CA / July 2013 – Aug. 2014

Prospira PainCare raised ~\$70MM in its opening round and is poised to be the nation's premier provider of comprehensive, interdisciplinary pain management services.

- Developed a 90 day tactical plan to kickstart the digital efforts and the long-term content, SEM and social strategies
- Built a geo-targeted SEO strategy focused on long tail keywords and local listings to achieve notable organic rankings for pain related searches
- Used Salesforce and Pardot to create landing pages and marketing emails for drip campaigns that nurtured PPC leads through the marketing funnel
- Introduced the voice and tone for the social media channels and managed the editorial calendar for social content
- Created and launched fully-responsive paincare practice websites and SEO-rich landing pages running on WordPress
- Successfully executed a grassroots social campaign leveraging Starbucks' Tweet-a-coffee program that led to local media coverage and new patient acquisitions
- Led the media planning and buying for display advertising campaigns
- Oversaw design and media agencies to produce creative assets for print and digital ads and collateral and promotional videos for distribution via online and offline mediums
- Monitored web analytics to report traffic stats and success of campaigns
- Constructed a new information architecture for a content rich corporate website that will house paincare practice websites as microsites
- Designed the interactive voice response (IVR) prompts for a national toll-free hotline and establishing scripts, standards and training protocols for call center CSR's
- Collaborated on the product strategy to clearly define products to be commercialized and approach to penetrating the marketplace

Over-C Client Projects

Product Marketing Consultant

Healthline (now Talix) / Mountain View, CA / Mar. 2013 – Dec. 2014

Healthline is a health informatics company that has enabled brands such as Aetna, Elsevier, GE and Yahoo! create intelligent health solutions to solve the needs of its patients, members and customers.

- Collaborated on the product strategy to clearly define products to be commercialized and approach to penetrating the marketplace
- Conducted branding and positioning exercises to refine the company's messaging
- Built the new corporate presentation pitch and new marketing collateral to support sales efforts
- Created a single page, responsive website running on WordPress for the enterprise sales team to use in lead gen campaigns
- Developed the concept, script and storyboard for a promotional video that mixes live action with animation and serves as the cornerstone of Healthline's new narrative
- Planned and coordinated the venue and agenda for a company-wide annual kick-off event that was live-streamed for NYC office
- Assemble slide decks for new business pitches and corporate development purposes

Marketing Consultant

Savannah College of Art and Design (SCAD) / Savannah, GA & Hong Kong / June 2013 – July 2013

Offering more degree programs and specializations than any other art and design university, SCAD prepares talented students for professional, creative careers.

- Produced a presentation deck to steer internal planning meetings run by the SVP of Marketing, Public Relations & Advertising

Strategy and Marketing Consultant

Grassroots Unwired / Philadelphia, PA / Feb. 2013 – Mar. 2013

Grassroots Unwired is a revolutionary in-person data collection company. Its mobile sales enablement tool is a fit for any business conducting customer acquisition and engagement in the field.

- Developed a marketing communications strategy and brand marketing material

Project Manager

Joint venture between 2-1-1 California and United Ways of California / South Pasadena, CA / Nov. 2012 – May 2013

2-1-1 California is the statewide network of local 2-1-1 information and referral providers. 2-1-1 California is a collaboration of United Ways of California and the California Alliance of Information and Referral Services (CAIRS).

- Provided oversight on the design and development of iPhone and Android mobile apps