

MARKETING EXECUTIVE

# Jason Kapler

Professional Overview





# Meet Jason

## Background

For more than 15 years, Jason has worked in marketing for enterprise software companies. He is responsible for developing go-to-market strategies, overseeing marketing operations from budget management to recruiting, and managing marketing program execution.

Along with managing trade shows and user conferences, Jason has organized private events that connect company leaders with prospective clients. Additionally, he has experience cultivating relationships with channel partners and industry analysts.

## Skills

- Strategic planner and deliberate problem solver with a proven track record of working cross-functionally.
- Expert at developing marketing programs and guiding organizations to achieve business goals and growth targets.
- Capable of analyzing market intelligence, consumer data, sales metrics, and marketing KPIs to uncover opportunities and inform decision-making.
- A skilled communicator capable of developing synergistic relationships with customers, colleagues, and key opinion leaders.

# Capabilities

## Leadership

- Business planning
- Budget management
- Marketing plans
- Performance reporting

## Strategic Marketing

- Buyer personas
- Competitive analysis
- Messaging & positioning
- Product Marketing
- Strategic planning
- S.W.O.T. analysis

## Digital Marketing

- Content development
- Digital advertising
- Email marketing
- Marketing automation
- Websites & landing pages
- Virtual events

## Traditional Marketing

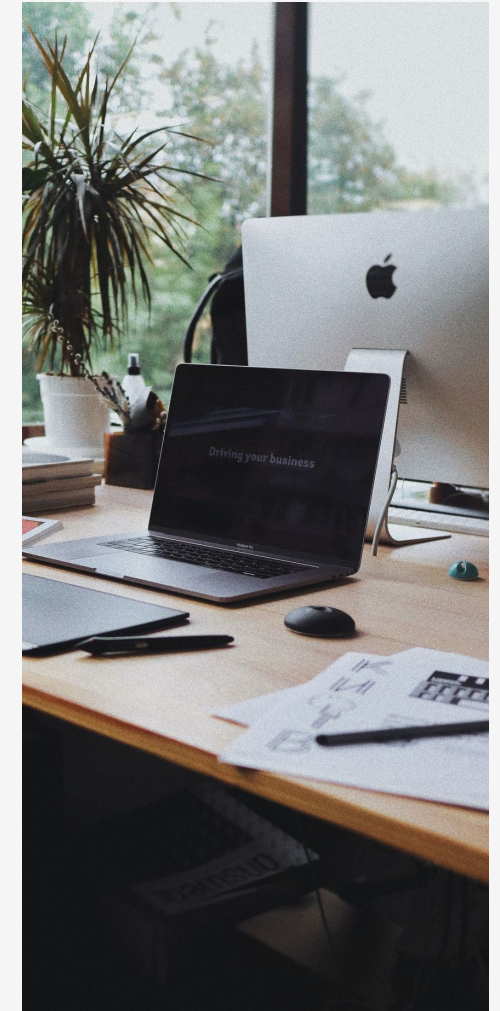
- Trade show marketing
- Speaking opportunities
- Event marketing
- Print advertising

## Communications

- Analyst relations
- Copywriting
- PR & media relations
- Press Releases

## Sales Enablement

- Collateral development
- Presentations
- Product demos
- Sales trainings & kickoffs
- Win/Loss analysis



# Work Highlights

## EvolutionIQ

AI-powered software that understands bodily injury and recovery like a medical expert and actively monitors insurance claims in order to guide frontline operators to the sick and injured claimants most in need of care or support.

### CLIENTS

New York Life, MetLife, Principal & Sedgwick

### BUYERS

CEOs, COOs, CFOs, Claims Executives, Strategy & Transformation Professionals

### REVENUE

3x for 3 consecutive years

### MOST PROUD ACHIEVEMENT

Launched marketing programs that helped raise \$31M in fundraising and triple revenue and customer base.

## LiveWorld

LiveWorld allows Marketing teams at F500 companies to better deepen relationships with customers through software, services, and an outsourced workforce of agents that enable brands to monitor and engage in digital channels.

### CLIENTS

AbbVie, American Express, FedEx & P&G

### BUYERS

Senior marketing execs in brand, digital, social media, research & customer support

### REVENUE

175% growth in last 36 months

### MOST PROUD ACHIEVEMENT

Launched SaaS product and built custom chatbots; Company named "One to Watch" by pharma trade publication, and grew agency services by \$4M.

## Networked Insights

Networked Insights, now known as Audience.ai, is a real-time data analytics software and services company specializing in enabling major advertisers to make smarter decisions with insights from consumer data.

### CLIENTS

Google, MillerCoors, MTV & Samsung

### BUYERS

Marketing Executives and functional leads in brand, analytics, digital & social media

### REVENUE

250% GROWTH IN 4 YEARS

### MOST PROUD ACHIEVEMENT

Named one of "World's 50 Most Innovative Companies" by FastCompany & Oversaw communication plan for \$20 million Series B funding announcement

# Testimonials

The first thing you'll notice about Jason, is his drive and commitment to jump in "feet first" and utilize his talent, marketing experience, and expertise. Jason is the epitome of a true multi-tasker, executing marketing deliverables based on overall marketing strategic initiatives. He has been an instrumental part of the team in driving go-to-market activities and developing web and e-mail based campaigns to push lead generation activities to the next level.



**Jaweed Metz**

Director of Product Marketing & Customer Advocacy at Contrast Security

**Relationship: Manager / Superior**

Jaweed was acting head and Director of Marketing at Asure Software when he worked with Jason

This is an easy one. Jason possesses strong marketing insights and the ability to transform them into relevant messaging and activities that drive solid results. He totally immerses himself in the world of his market and quickly becomes a respected thought leader in both the industry and his company. We've had many interactions and his contributions were always well thought out and delivered with a focus on solving the problem and always without ego.



**Skip Balch**

Vice President Sales, Growth Acceleration Partners

**Relationship: Sales Colleague / Peer**

Skip was SVP, Sales Company at Networked Insights when he worked with Jason

I have seen how effectively he is able to work with team members and contribute to projects. Jason adds a professional and personal touch to all his communications with colleagues to help them build out marketing activities. In brainstorming marketing initiatives with Jason, I have found that he is open to new ideas, often suggests new and innovative ways to get the message out and is good at connecting the dots between product, sales and marketing.



**Ram Reddy**

Director Digital Transformation at Designit

**Relationship: Client Services, Colleague / Peer**

Ram was Director Strategic Client Services at Networked Insights when he worked with Jason

# Competence in Marketing & Sales Applications

CRM, Email, PR, Social Media & Web Management



HubSpot



salesforce  
marketing cloud



Adobe



Google  
AdWords



Google Analytics



Hootsuite



Salesforce™



SALES  
LOGIX



crazyegg

# Why Jason

## Strengths

- Observant, organized & contemplative
- Patient, analytical & principled
- Assertive, polite & respectful

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## Weaknesses

- Overzealous focus on details
- Dissatisfied when over budget
- Lifestyle favors professional achievement

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## Opportunities

- Develop a leadership model that encourages experimentation and adaptation in pursuit of better execution and performance
- Engage colleagues across an organization to work together to achieve goals and deliver results

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## Threats

- Possibility of authoring a Modern B2B Marketing Playbook for enterprise software companies
- Risk of buying a taco truck and launching a mobile food empire



# Resume

DOWNLOAD A COPY

[www.jasonkapler.com/resume](http://www.jasonkapler.com/resume)

## Work Experience

### **EvolutionIQ,**

New York, NY — Vice President of Marketing  
October 2021 - PRESENT

AI-powered software that understands bodily injury and recovery like a medical expert and actively monitors insurance claims in order to guide frontline operators to the sick and injured claimants most in need of care or support. Achievements/Tasks

- ⇒ 3x revenue growth for 3 consecutive years
- ⇒ Lead PR & communication plan for \$20 million Series A funding announcement

### **LiveWorld**

New York, NY — Vice President of Marketing  
July 2014 - October 2021

LiveWorld enables marketing and support teams at F500 companies to better connect and deepen relationships with customers through software, services and an outsourced workforce of agents enabling companies to better monitor and engage in digital channels. Achievements/Tasks

- ⇒ Launched new marketing initiatives targeting senior decision- makers by integrating automated digital programs, advertising, direct mail, and live events.
  - ⇒ Spearheaded development of new software products and services to bolster offering to new audiences, accelerate lead generation, and grow existing accounts.
  - ⇒ Restructured SaaS sales group, implemented new measurement and reporting procedures, and grew revenue in key strategic verticals.

## Work Experience Cont.

### **Networked Insights**

New York, NY — Head of Marketing  
February 2011 - July 2014

Networked Insights, now known as Audience.ai, is a real-time data analytics software and services company specializing in enabling major advertising brands to make smarter marketing decisions with insights from real-time consumer data. Achievements/Tasks

- ⇒ Grew revenue 3x in less than three years through product marketing, demand generation programs and sales enablement. Built marketing org from 1 to 10+ colleagues.
  - ⇒ Helped start-up gain recognition as one of the world's '50 Most Innovative Companies' by Fast Company.

### **Convio (Blackbaud),**

Austin, TX — Senior Director, Marketing Programs  
March 2009 - January 2011

### **Asure Software/iEmployee**

Austin, TX — Senior Product Marketing Manager  
February 2008 - March 2009

### **Affiniscape**

Austin, TX — Director of Marketing Operations  
January 2006 - February 2008

### **Barton Creek Resort & Spa**

Austin, TX — Senior Assistant Golf Professional September 2001 - November 2005

## Marketing Experience

Budget Management, Collateral Development, Competitive Analysis, Conferences & Speaking Opportunities, Content Development, Copywriting, Direct Marketing, Email Marketing, Event Marketing, Lead Generation, Marketing Strategy, Messaging, Newsletters, Positioning, Presentations, Product Marketing, Public & Media Relations, Sales Enablement, S.W.O.T. Analysis & Virtual Events.

## Professional Skills

- ⇒ A strategic planner and deliberate problem-solver with a proven ability to collaborate cross-functionally..
- ⇒ Expert at developing marketing programs and guiding organizations to achieve business goals and growth targets..
- ⇒ Capable of analyzing market intelligence, consumer data, sales metrics, and marketing KPIs to uncover opportunities and/or inform decision-making..
- ⇒ A skilled communicator capable of developing synergistic relationships with customers, colleagues, and key opinion leaders.

## Education

Arizona State University,  
Tempe, AZ — Marketing 1995 - 1998

Babson College,  
Babson Park, MA — Entrepreneurial Studies 1994 - 1995



# Let's Connect

To schedule a meeting or request more information



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# Work Samples

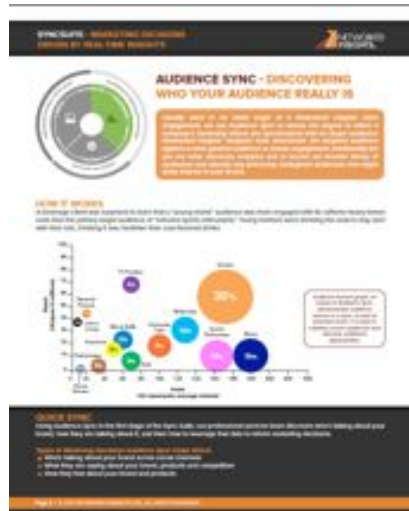


# Marketing Projects

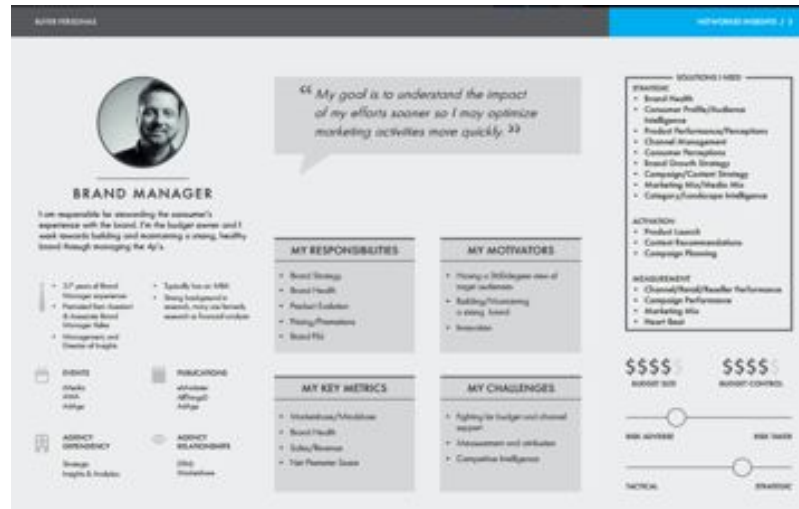
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# Speaking the Buyer's Language

## PRODUCT MARKETING CASE STUDY



Buyer Personas



Buyer Personas



Case Studies

### CHALLENGE

Sales was adept at getting the attention of the C-Suite, but struggled to get traction with the marketing organization.

### SOLUTION

Broaden the current go-to market messaging. After researching and building out the expanded buyer personas, a sales toolkit was released with new solutions, case studies, presentations, and case studies to improve sales conversions.

### RESULTS

The team was able to convey domain expertise and offer assets specific to target key roles within a marketing organization building trust within and overcoming previous obstacles to building strategic relationships.

# Targeted Brand Building Programs

## DIRECT MARKETING – CASE STUDY



Company brochures tailored to specific audiences & value propositions

### CHALLENGE

After rising from fourth place manufacturer to category leader, Samsung wanted to minimize the impact of the iPhone 5 launch.

### SOLUTION

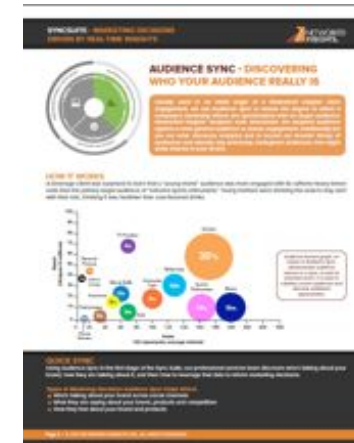
Respond with a marketing campaign designed to halt momentum and shift the conversation by highlighting product misconceptions. Using insights from social data to guide creative decisions, a print ad and TV commercial were developed in record time.

### RESULTS

Samsung stole the spotlight from a foe and declared technology superiority. The effort de-positioned a rival and won new customers.

# Content Marketing

## THOUGHT LEADERSHIP – CASE STUDY



White Papers, Best Practice Guides, Tip Sheets & Customer Analysis

### CHALLENGE

An emerging technology promises unprecedented efficiencies and unimaginable reach. How can a solution provider turn the situation into an advantage?

### SOLUTION

Convey domain expertise and create an opportunity to strengthen the brand's position as leader in digital communications through a best practices and how-to content marketing series.

### RESULTS

The informative campaign attracted new business and won loyalty with existing users. The content was reformatted for webinars, tip sheets, whitepapers and live events.

# Generating Awareness

## MEDIA & ANALYST RELATIONS



**FAST COMPANY**  
**THE WORLD'S**  
**50 MOST**  
**INNOVATIVE**  
**COMPANIES 2012**

**MOST INNOVATIVE COMPANIES 2012**

**39\_NETWORKED INSIGHTS**

**FOR USING REAL-TIME SOCIAL DATA TO MAKE BETTER PRODUCTS AND ADVERTISING**



**THE WALL STREET JOURNAL.**  
U.S. EDITION | Sunday, October 21, 2012, As of 7:20 PM EDT

ADVERTISING | Updated October 21, 2012, 7:20 p.m. ET  
**Tweets Spawn Ad Campaigns**  
*Chatter on Social-Media Sites Gives Marketers Direction for Commercials*

By SUZANNE VRANICA  
The newest member of Samsung's **Galaxy SIII** SE +1.00% Mobile's Mad Men team: Twitter. Samsung's latest television ad, which mocks Apple Inc.'s **AAAP**, +2.25% new iPhone, is striking a chord with consumers, at least judging by its popularity on YouTube. The South Korean electronics maker credits part of its success to the fact that its ad was partly crafted by mining consumer comments on Twitter and incorporating them into its pitch.

Top: a Samsung ad teasing Apple above, PG&G's Duracell commercial. The spot shows people talking about different features of the new iPhone as they wait in line for an Apple store to open. One of the customers says: "I heard that you have to have an adapter to use the dock on the new one." Another young man chimes in: "Yeah, yeah but they make the coolest adapters."


According to Samsung, those lines and other parts of the ad's script were based on "hundreds of thousands" of Tweets complaining or poking fun of specific features of the iPhone 5 such as the need for an adapter if a person wants to use the phone with older speakers, chargers or other accessories in the house.



# ADVERTISING IN THE MOMENT

**Real-Time Strategies for Paid  
Social Media**

**JUNE 2013**  
**Debra Aho Williamson**  
Contributors: Christine Bittar, Tracy Tang



FOR: Customer Intelligence Professionals



**The Forrester Wave™: Enterprise Listening Platforms, Q2 2012**  
by Zach Hoffer-Shall, April 24, 2012

**KEY TAKEAWAYS**

**The Listening Platform Landscape Is Still Maturing And Moving**  
Although this is Forrester's fourth Wave™ evaluation on the space, we still see new entrants and the market still experiences its share of mergers and acquisitions.

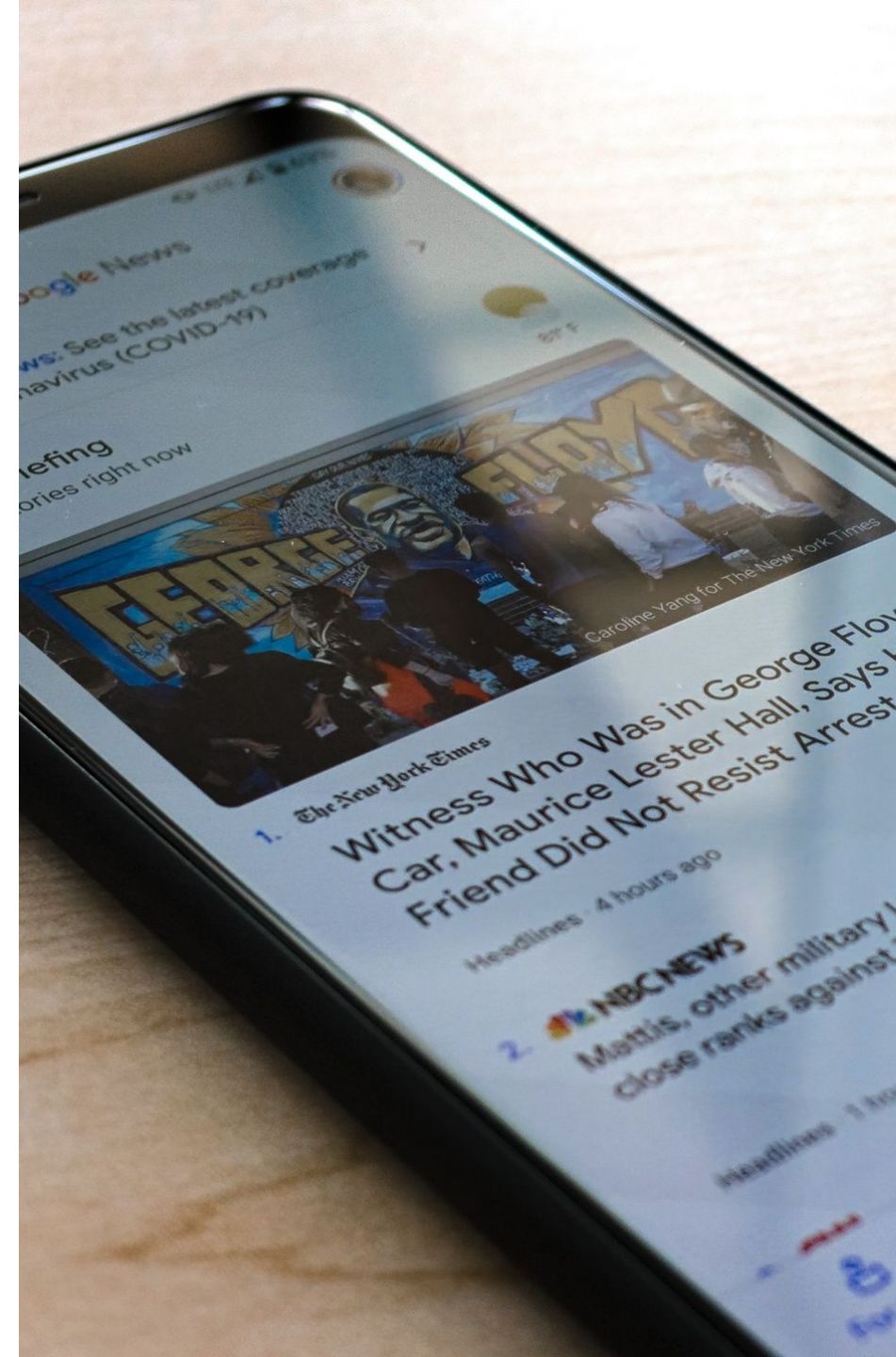
**Radian6 and Visible Technologies Lead The Market**  
Due to the varied functionality in their current offerings, Radian6 and Visible Technologies meet today's needs, and both presented competitive road maps to extend their offerings.

**The Enterprise Listening Platform Landscape Holds Many Viable Options**  
Along with the two Leaders, many vendors offer competitive technology and services in this crowded market.

Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02142 USA  
Tel: +1 617.613.8000 | Fax: +1 617.613.5000 | www.forrester.com

# Contributed Content

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# Bylines & Articles

# ADWEEK

SOCIAL PRO DAILY

## Bring Your Brand to Life With Always-Present Customer Engagement

Opinion: Chat bots offer the opportunity to build and manage conversation marketing programs at scale

By Jason Kapler | December 29, 2017



One-to-one communication with consumers represents the new competitive landscape  
Weedezign/Stock

# CHIEF MARKETER

## MESSAGING APPS AND CHATBOTS: A HUGE OPPORTUNITY FOR AGILE BRANDS

Posted on January 30, 2018 by Jason Kapler

With Alexa and other digital assistants aiding our day-to-day tasks, can you be your customer's personal assistant? Can you be right there with them, tethered and available in real-time, as a helpful, handy and human virtual assistant?

Experienced brand marketers are increasingly deploying messaging apps and chatbots to meet their conversational marketing needs. Facebook Messenger, once a distant second to China's WeChat in terms of innovative in-app features and consumer usage, has advanced its messaging and chatbot capabilities almost overnight, bringing its global reach along with it. As a result, Facebook reports that of the 70 million brands/pages active on the platform, nearly 20 million are actively responding to consumer messages on a monthly basis.

The rapid shift to messaging is no accident. Multiple sources of data suggest consumers prefer to interact with brands via messaging, as it gives them on-demand access to brands, whenever and wherever they are, to inquire about products or services or resolve customer service concerns. In China, WeChat users spend as much as one-third of



# SMART CustomerService

## Chatbots and Agents: The Winning Combination for Exceptional Customer Service

Jan 12, 2018

Jason Karlar

More companies are beginning to augment their customer service departments with a not-so-secret weapon for scale: chatbots. In fact, 80 percent of decision-makers say they already use or are planning to use chatbots by 2020. There is a debate, however, as to whether human agents will one day be replaced by bots and if not, how the dance between the two can best be orchestrated.

We hear quite a bit these days about customer service chatbots. Why? Because customer service organizations have been forced to rethink how they interact with customers. Consumers are increasingly leveraging social channels to engage with companies, particularly with apps like Facebook Messenger, which has more than 1.3 billion monthly active users.

Customers want a more personal and customized experience, and they want it on demand. To reach customer support in real time, 63 percent of people would consider talking online with a chatbot. However, 79 percent of people would need to know a person could jump in if the bot struggled. Customer service has thus shifted from simply resolving issues through traditional channels to building relationships via one-on-one conversations on customer-preferred channels. This ultimately improves the customer experience and inspires customer loyalty.

# Marketing Thought Leadership

As a marketing professional, I have worked with and learned from some truly remarkable brands and marketing professionals.

My perspectives on marketing, analytics, advertising, and social media have been published in the following media outlets:

**Bloomberg  
Businessweek**

 **eMarketer**

 **Social  
Media  
Today**

 **ad  
exchanger**

 **MediaPost**

**PRSA** Public  
Relations  
Society of  
America

**iMEDIA**   
CONNECTION

 **MarketingProfs**

**SOCIAL  
MEDIA  
WEEK** **ADWEEK**



# My Marketing Approach

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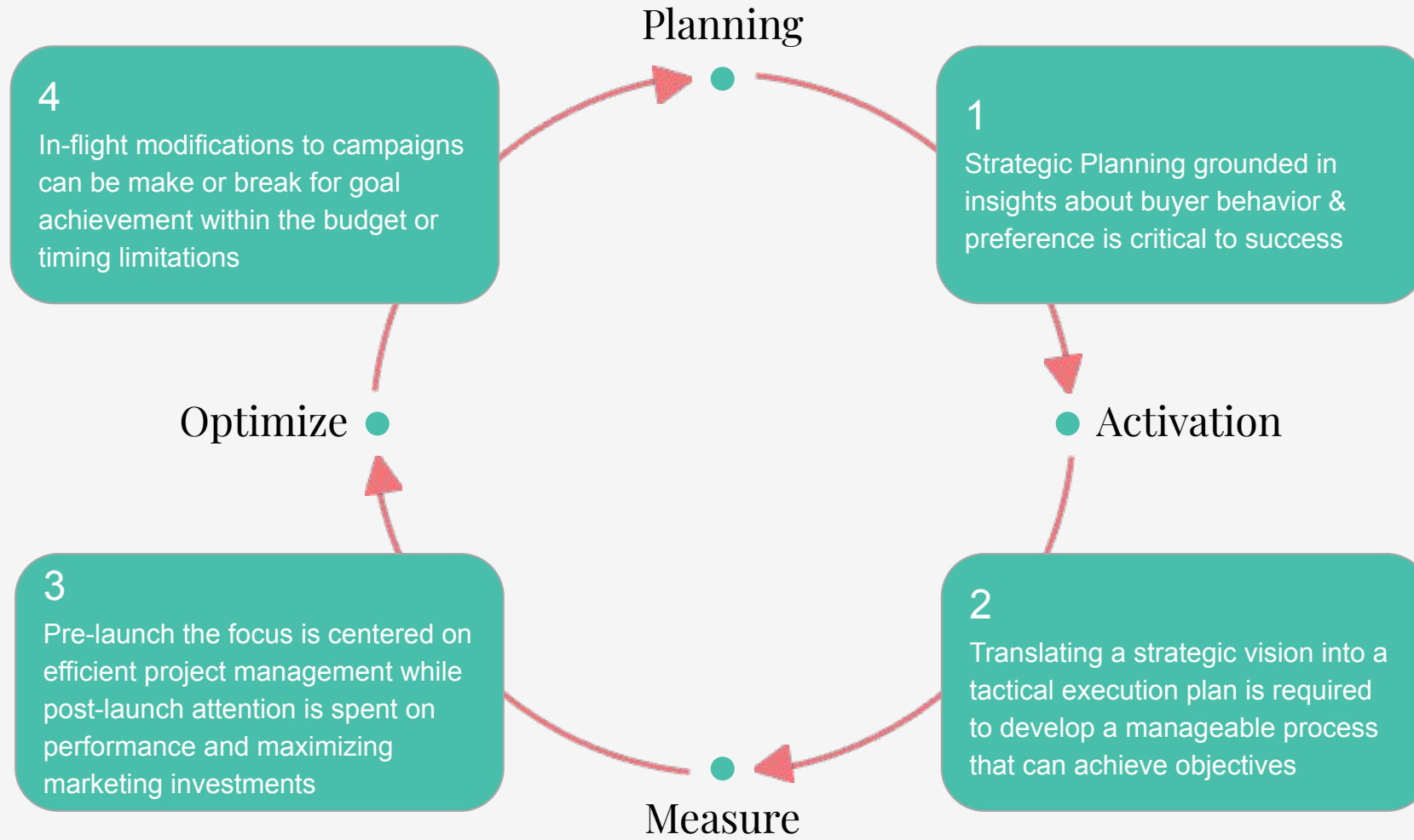
## My Core Beliefs

# Great B2B Marketing Is:

1. Rooted In Customer Success Stories
2. Guided By Research Based Strategies
3. Unafraid to Take Risks & Be Bold Tactically
4. Continuously Reinforcing Value Statements
5. Informed By Performance Data

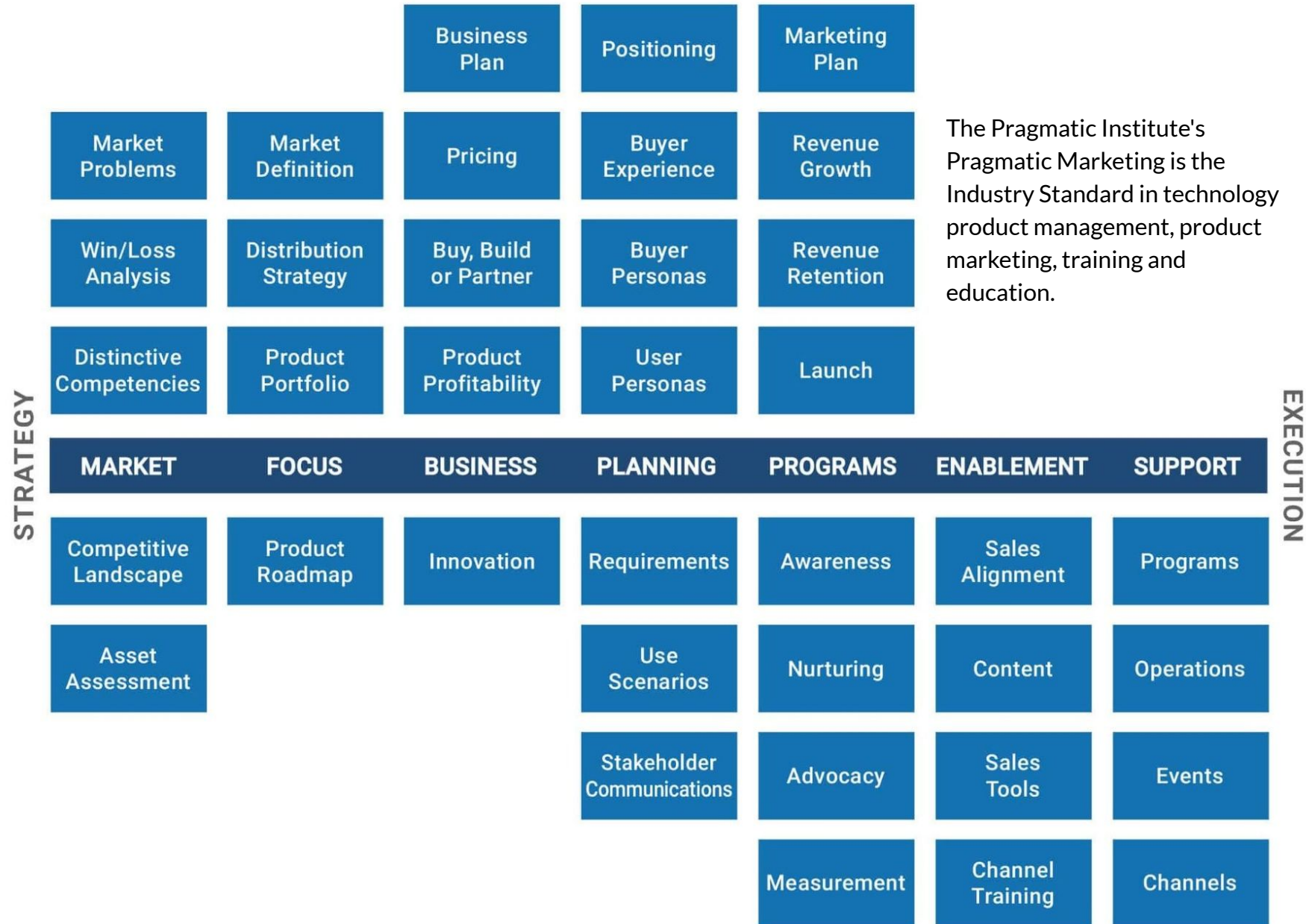


# Acquisition Focused Marketing



# Pragmatic Marketing Framework

Jason has 15+ years experience implementing and executing a proven market-driven model for managing and marketing technology product



"Your customers are the heroes of their success stories, and your product is their faithful sidekick. Empower them to reach their goals and you'll have a customer for life."



Jason Kapler





## Jason at Work

Building high-performing teams focused relentlessly on customer acquisition and revenue growth has been key to my success. From established companies to high-growth startups, my adaptable, driven, and proactive approach to marketing allows companies to add an experienced leader who can boost productivity and performance across marketing and sales.

Having worked in emerging technologies, software products, mobile apps, and consumer platforms, I understand how to leverage data-driven strategies to connect with and influence audiences.



## Jason Away from Work

A native of Los Angeles, I began my technology career at Dell before joining several software startups in Austin, Texas. Before becoming a marketer, I managed corporate and charity golf outings and taught golf to groups and individuals at one of Texas' largest resorts.

One of my favorite pastimes is exploring new cultures. New York City offers museums, cultural centers, restaurants, and markets where one can learn about different beliefs and customs. To discover new things, however, I prefer to travel and see the world first-hand.



# Let's Connect

To schedule a meeting or request more information



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