

JAMES (JIM) BARTON HALTER

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Business Consultant | Business Coach | Integrator | Fraction COO & Executive Sales Leader

Executive-Level / Sales and Revenue Generation/Operational Performance Leader with exceptional sales, business development, general management/operations, private equity, environmental and sustainability experience. Unsurpassed revenue and EBITDA generation, and strategic forecasting to deliver sustainable profitable growth and stakeholder value in highly competitive business environments. Specializes in turnarounds and new growth initiatives.

Scope has included penetrating and managing global industrial customer accounts totaling \$500M+ and operationally overseeing local, regional, and U.S. and Canadian business units exceeding \$60M. Demonstrated strong fiscal discipline in start-up, turnaround, M&A integration, organizational transformation change, and high-growth business life cycles. Direct leadership accountability for organizations employing 350+ employees. Extensive industry experience includes, but is not limited to: energy (oil and gas), power, construction, engineering, environmental, steel, heavy and light industrial, and private equity. Customer base includes; fully-integrated oil & gas, refining, production, pipeline, chemical, engineering, design, contractors, EPC, light and heavy manufacturing firms and distribution channels.

KEY AREAS OF STRENGTH

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|--|-----------------------------------|---------------------------|
| Visionary/Strategic Thinker | High Performance Team Building | Stakeholder Management |
| Operational Execution | Customer Buying Trends | Results Oriented |
| Drive Customer/Market Demand | Sales and Operational Performance | Innovation |
| Best-in-Class Sales Process Implementation | Competitor/Industry Analysis | P&L/Budget Accountability |

PROFESSIONAL EXPERIENCE

JIM HALTER CONSULTING (www.jimhalter.com) Houston, TX

AUGUST 2020 - PRESENT

Jim Halter Consulting focuses on making entrepreneurial-minded businesses better by focusing on the big picture, aligning everything for success and paying attention to the details that predictably and sustainably deliver the right results.

PRESIDENT | FOUNDER – BUSINESS ADVISOR, CERTIFIED EXECUTIVE COACH, FRACTIONAL INTEGRATOR AND FORMER PROFESSIONAL EOS® IMPLEMENTER

Responsible for company strategic direction, revenue, and earnings growth, innovating the business to meet customer needs and client fulfillment.

APEX HERITAGE GROUP (www.apexlp.com) Houston, TX

OCTOBER 2019 - APRIL 2021

Apex Heritage is a family office fund that invests in small-to-mid-sized companies located in the Southern US region. Focus is on identifying and growing entrepreneurial industrial manufacturing and services companies. Investment strategy centers on acquiring and building diversified businesses across a range of industries.

Vice President Sales and Marketing

Responsible for the support of revenue and earnings growth through sales and marketing strategies and their implementation for the Apex Heritage Companies.

- Currently supporting sales and marketing initiatives at Dan-Loc Group and Ashburn Chemical Technologies.
- Organizational Responsibilities at Apex Heritage: Four marketing personnel (VP Marketing, Graphic Designer, Marketing Analyst, Marketing Programs.)

ASHBURN CHEMICAL (www.ashburnchemical.com) An Apex Heritage Company

OCTOBER 2019 - APRIL 2021

Privately Held company providing specialty chemical solutions for the automotive, soil and gas, energy, transportation industries.

Chief Marketing Officer

Responsible for revenue and earnings growth through the development and execution of marketing plans designed for market qualified lead generation, revenue, and earnings growth.

DAN-LOC GROUP (www.danlocgroup.com) Apex Heritage Company- Houston, TX **FEBRUARY 2019 - OCTOBER 2019**

Privately Held specialty industrial manufacturer of threaded products for the oil and gas, energy, transportation industries.

Vice President Sales and Marketing

Responsible for revenue and earnings growth, while restructuring and managing the company's Business Development and Marketing organization and branches.

- Organizational Responsibilities (30 people): Outside Sales Team, Technical Sales, Inside Sales Team, Business Development, Sales and Operations responsibility for branches in Texas, Louisiana and Ohio.
- Responsible for developing and implementing processes, accountability, scalability, and the go-to-market strategy and rebranded the company, which included a value proposition, communications plan (internal and external), new website, marketing collateral, trade show exhibit booths, and presentation templates. Along with looking for new markets to drive the diversification of the customer base, new branch locations and building a high-performance sales team.

CERTIFIED SAFETY (www.certifiedsafety.net) League City, TX

2015- 2019

Private Equity owned specialty contractor providing safety solutions that increase safety certainty in an uncertain world and lowers project cost by increasing craft productivity and by preventing injuries.

Senior Vice President Business Development and Marketing | Board Member

Responsible for revenue and earnings growth, while restructuring and managing the company's Business Development and Marketing organization. Profitable YoY revenue growth for four fiscal years increasing revenues 57% in initial three years, and a year-to-date (Q3) fourth year revenue increase of 19% with a forecasted 16% EBITDA growth.

- Developed and implemented specific to CertifiedSafety:
 - Processes, discipline, and accountability to the sales organization
 - CRM tool and processes to track sales and reporting pipeline performance
 - Sales process and playbook, while integrating in the Sandler Sales Program.
 - Accurate revenue forecasting methodology
 - Compensation and commission plans
 - Orientation and on-boarding process for new hires
 - SG&A annual budget
- Developed the go-to-market strategy and rebranded the company, which included a value proposition, communications plan (internal and external), new website, marketing collateral, trade show exhibit booths, and presentation templates.

THE HALTER STRATEGY GROUP, INC. (www.halterstrategy.com) Houston, TX

2012- 2015

Private company consulting to leadership teams providing proven growth strategies to maximize earnings.

Principal / Executive VP Sales & Business Development

Strategic Sales Leader and Executive Consultant to leadership teams in the energy, environmental, construction, and private equity industries using proven growth strategies to maximize earnings without compromising margins. Major clients were private equity group TPG/Kini Consulting (National pricing initiative for TPG company), Trek Travel (Sales training), and RECON (Market and profitable growth strategy).

WASTE MANAGEMENT INC. (www.wm.com), Houston, TX, and Irvine, CA

1995-2012

\$13B leading provider of comprehensive waste management services.

Vice President Sales– Construction Solutions (2008-2012)

As a high impact contributor, promoted to design, develop, plan and execute the go to market strategy to achieve maximum profitable growth in newly segment-designed construction operations and sales organization. Managed 200+ employees, \$500M+ multi-disciplinary segment targeted to achieve sales, customer service, and operational goals.

- By driving customer demand and generating new business opportunities, achieved 109% of revenue target (120% YOY improvement), market share improvement 1% and 11% below the Construction Solutions expense budget for 2011. Through 2012, the Segment achieved 102% of revenue budget (12% YOY increase), 8.7% under expense budget and a reduction of 19% in the cost of sales.

- Designed, built, planned, and executed the customer focused growth strategy based on customer buying patterns and needs to execute and use strategic targeting tools to increase market share in a declining market, while becoming more effective with resources by reducing Cost of Sales (COS). RESULT: Over \$100M in total revenue growth and 15% increased profitability.
- Designated as the company's "voice" to change customers' perception of the waste industry by providing value-driven sustainability and value-chain solutions. Customers included those in ENR's Top 400 list (i.e., Turner Construction, Balfour Beatty, Skanska, Kiewit, PCL Construction, Mortenson Construction, Whiting Turner, etc.) and local and regional players in the U.S. and Canada.
- Directed the overall marketing strategy.
- Developed, as a team, a "Life Cycle" construction-training program for 120+ Sales reps to carry message and processes to customers.
- Identified resources necessary and business development opportunities to sustain profitable growth and uncover/address gaps in operational needs, forecasting out five years.
- Developed the first strategic market share and forecasting tool for realigning and allocating personnel and capital resources in North America.
- Created strategic partnerships and alliances throughout the value chain spanning from the supply chain to the company's customers' base and with external industry stakeholders.
- Interfaced with the IT Department to develop and deploy a web-based enterprise system, Diversion and Recycling Tracking ([DART®](#)) tool, designed to track customers' waste diversion efforts on construction projects.
- Waste Management Circle of Excellence Award for Top Segment Performance in 2011 (2012).

Senior Director, Sustainability Enterprises & Vice President, Green Squad, LLC (2007-2008)

Promoted to design, develop, plan and execute the go to market strategy to launch [Green SquadSM](#) (Waste Management's sustainability consulting group) into the U.S. and Canada.

- Responsibilities included sales, business development, marketing, operations, recruitment, training, the P&L for the organization, developing sustainability-oriented value propositions and offerings, market analysis, targeting the market, competitor analysis, and pricing ensuring profitability and integration.

Director, Industrial Sales and Service (2005-2007)

Promoted to lead National Account Managers and Program Managers, drive profitable growth, set sales revenue budgets and performance standards, select companies with the greatest ROI from energy (oil and gas), power, transportation, EPC and National Environmental Contractor segments; managed expenses and receivables, and launched pricing strategies.

- Negotiated three-year extension of Chevron Global Agreement emphasizing value of Strategic Alliance (\$32M).
- Directed National Account Sales Team (14 sales/support personnel) achieving ~\$262M in 2007 annual revenue and Industrial Sales Team (14 sales personnel) responsible for ~\$250M in 2006 annual revenue.
- Served as a Steering Committee Member and process owner for WM National Accounts Strategic Business Plan initiative (\$1B in sales).
- Work included, but was not limited to Chevron, BP, Marathon, Valero, Exxon, ConocoPhillips, Suncor, BBL, CH2M Hill, Shaw, KBR, Technip, Flour, Zachary, Bechtel and received the BP Alliance Supplier Award in 2007.

Director, Petrochemical Sales and Service/ Manager, Petrochemical Vertical (2002-2005)

Promoted to oversee National Account Managers and Program Managers to drive profitable growth, set revenue budgets and performance standards, selected prospects, and managed expenses, receivables, pricing, and contracts.

- Developed sales strategy to increase annual revenue \$120M in 2005 for Sales Team based on in-depth industry research of petrochemical industry.
- Achieved 107% Revenue Budget Performance (\$6.4M over budget) in 2004.
- Achieved 105% Revenue Budget Performance (\$3.4M over budget) in 2003. Assigned to Steering Committee for BP Global Agreement (BP Retail and Manufacturing locations).
- Developed and managed a team focused on selling/marketing to petrochemical industry increasing profitable revenue 123%.
- Sold directly or partnered to deliver in-plant services (specialty labor), chemical cleaning, hydro-blasting, filter pressing & dewatering, scaffolding, engineering services, water treatment, modular construction trailers, Port-O-lets, non-hazardous, hazardous, and special waste transportation, recycling, incineration and disposal.

Manager, Customer Partnerships – WMX Technologies (later to become Waste Management, Inc.) (1995-2001)

Promoted to drive profitable growth, spearhead business development and implementation of Customer Partnerships with strategic national industrial customers to maintain long-term relationships and maximize share of business earned from this customer base.

- Responsible for selling industrial services to the petrochemical and industrial operations of our client's. These included, in-plant services (specialty labor), chemical cleaning, hydro-blasting, filter pressing & dewatering, scaffolding, engineering services, water treatment, Port-O-lets, modular construction trailers, non-hazardous, hazardous and special waste transportation, recycling, incineration and disposal.
- Increased customer satisfaction from 8.5 to 9.5 (12% from 1996 – 2001) for every year of the Alliance relationship.
- Grew profitable revenue by 290% in three years by facilitating implementation of WM and its industrial services into Chevron facilities.
- Achieved best practices for cost reduction programs across Chevron's operations and documented customer "Total-Cost-of-Ownership" savings of \$520K (1996), \$700K (1997), \$1.7M (1998), and \$1.4M (1999).

Brand Industrial Services - *Vice President, General Manager*

Bechtel Engineering, B-CAM Division - *Division Manager, Western U.S. Operations Manager*

EDUCATION & CERTIFICATIONS

CERTIFIED EXECUTIVE COACH – Center for Executive Coaching

PROFESSIONAL EOS IMPLEMENTER® – EOS® WORLDWIDE

SANDLER SALES TRAINING – FOUNDATIONS, MASTERY, AND SALES MANAGEMENT

LEAN SIX SIGMA CERTIFICATE – Villanova University

USGBC- LEED® AP BD+C. LEADERSHIP IN ENERGY AND ENVIRONMENTAL DESIGN LEED® ACCREDITATION

MASTER OF BUSINESS ADMINISTRATION – University of Phoenix, Graduate School of Business, Houston, TX

BACHELOR OF SCIENCE – University of Texas at Austin, Austin, TX

PAST AND PRESENT PROFESSIONAL ASSOCIATIONS & BOARD MEMBERSHIPS

Private Directors Association – Founding Member of Houston Chapter (2020)

Institute of Management Consultants USA

Turnaround Management Association

USGBC – United States Green Building Council

For Profit Boards: Certified Safety (Executive Board Member), [Green Halo](#) (Executive Advisory Board), IL Palazzo Condominium Association (President and Chair)

Non-Profit Boards: Board of Trustees – St. Stephen's Episcopal School

Community Volunteer Work:

Hermann Park Conservancy – Board Member