

STEVEN LOCKHART
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SUMMARY AND PROFILE

RESULTS-DRIVEN CEO AND CMO

STRATEGIC PLANNING | FINANCIAL MANAGEMENT | LEADERSHIP | PROBLEM-SOLVING | COMMUNICATION

Highly accomplished Marketing/Sales focused Chief Executive Officer with a strong background in leading companies to exceptional growth and profitability. Adept at formulating and executing strategic plans, optimizing financial performance, and inspiring high-performing teams. Known for decisive problem-solving, effective decision-making, and outstanding communication and presentation skills. Seeking to leverage my expertise as a CEO or C-Level member of a growth-oriented company.

PROFESSIONAL EXPERIENCE

Branding | Marketing | Advertising; Irvine, CA

Chief Executive Officer

Dec 2019 - present

Drove business success through innovative marketing strategies encompassing Digital Marketing, SEO, SEM, Brand Development, Social Media, Google My Business, Advertising, and Video Production.

- ✓ Drive vision, strategy, and execution on marketing initiatives for regional clients.
- ✓ Collaborate with stakeholders as a digital marketing expert, providing strategic input and recommendations.
- ✓ Deliver public speaking engagements as a digital marketing expert and business growth leader, sharing insights and thought leadership.

✓ **Fortune 50 Company Marketing Funnel Management**

Successfully managed a \$3M marketing spend for one of the largest sales team recruiting programs, utilizing a diverse range of channels, including social media, Adwords, thought leadership, and press releases.

✓ **Medical Services/Products**

Slashed client acquisition costs from \$100 to under \$10 and achieved a significant increase in clients from 1,600 to 10,000 per month within 12 months. Grew revenue from \$2.5 Million to over \$12 Million per year.

Doubled top-of-funnel and bottom-of-the-funnel product sales within 6 months, managing a \$100,000+ Google Adwords budget, \$30,000+ social media budgets, and \$10,000+ in outside consulting expenses.

✓ **Financial**

Comprehensive strategic marketing plan for the launch of a Business Development Corporation.

Fractional Chief Marketing Officer services to a \$300 Million Real Estate Equity Fund.

✓ **Mental Health Services**

Doubled top of funnel within 3 months, optimizing a \$100,000+ Google Adwords budget, \$30,000+ social media budgets, and \$10,000+ in outside consulting expenses.

✓ **Real Estate**

Orchestrated a successful marketing plan, elevating online presence from no ranking to #1 in Newport Beach, Newport Coast, and #3 in Orange County within 3 months, utilizing targeted local strategies.

BrandRep; Santa Ana, CA

Interim Chief Executive Officer

Aug 2023 - Nov 2023

As a turnaround specialist, I was brought in to address critical challenges within BrandRep to save the large marketing company with 9,000 active clients. Within three months, I successfully:

- ✓ Restructured marketing plans to achieve a path to profitability, eliminating plans that guaranteed losses.
- ✓ Implemented a 32% workforce reduction (from 102 to 70), managing and minimizing legal risks.
- ✓ Reorganized the \$1.2 million monthly budget.
- ✓ Secured \$400,000 annual savings in citations building.
- ✓ Revamped \$200,000 per month advertising budget to align with the target market and sales plans.
- ✓ Initiated \$500,000+ annualized savings with a CRM alternative.
- ✓ Set the company up to be profitable (reversed \$400k/month loss within 6 months to profit).

Lab Medical Group; Orange County, CA
Chief Executive Officer | Chief Marketing Officer

May 2015 - Dec 2019

- ✓ Transformed the company from a team of 3 to 60+ employees and served as CEO, overseeing all business units.
- ✓ Orchestrated acquisition by a billion dollar company, turning the acquiring business unit around.
- ✓ Converted a \$400K monthly loss into positive net income.
- ✓ Led brand development, presentation, and metrics for measuring strategic success, increasing billings from \$100K to over \$4M per month.
- ✓ Built a 20-member marketing and sales team, ensuring cohesive efforts and business growth.
- ✓ Generated \$4M+ in monthly billings by developing a customer journey, messaging strategy, positioning, differentiators, proof points, and value proposition for healthcare products.

MarineHQ; Irvine, CA
Chief Marketing Officer

March 2013 - May 2015

- ✓ Built a \$2 million eCommerce platform within 2 years without financing.
- ✓ Managed all marketing, communications, partnerships, contracts, and finance.

Bay Shore Industries; Newport Beach, CA
Vice President of Marketing and Sales

Aug 2007 - March 2013

- ✓ Pioneered business growth from \$200,000 to \$5M in revenue per year, achieving a remarkable 1,000% increase in the customer base within 5 years.
- ✓ Successfully managed B2B2C programs and established key partnerships with leading retailers like Sam's Club, Costco, and others.

Clipper Marketing; San Diego, CA
Chief Executive Officer | Chief Marketing Officer

Aug 2000 - Aug 2007

- ✓ Generated \$5 Million in annual revenue with \$2 Million in Net Income, personally responsible for 75% of business growth through closing multi-million dollar deals.
- ✓ Invested in mortgage and auto parts companies, personally generating millions in loans and sponsored a NASCAR team.
- ✓ Created and implemented action plans to develop brand recognition, market awareness, and advertising for clients, identifying target markets, conducting competitive and market analysis, and highlighting key differentiators and high-margin products.
- ✓ Led marketing strategy for 12 public companies during mergers or acquisitions and successfully created a Business Development Corporation (BDC) from scratch, leading to a publicly traded entity.
- ✓ Managed Social Media, Public Relations, Investor Relations, and Internal/External Communications, ensuring effective communication and brand positioning.

BOARDS and ORGANIZATIONS

Amazon Web Services (AWS) Executive Advisory Board Member 11/2023-Present

California Small Business Association - Small Business Advisory Council Board Member Jan 2019 – Present

EDUCATION AND OTHERS

The University of Phoenix, Phoenix, AZ Expected 2026

Master of Business Administration

The University of California, Los Angeles, CA

Executive Certificate, Advertising

The University of North Dakota, Grand Forks, ND

Bachelor of Arts, Economics and Marketing

Technologies, Certifications, & Licenses

Technologies: Google Analytics, Google Search Console, SEMrush, Ahrefs, HubSpot, Zoho

Certifications: Google Adwords; Google Analytics; Google My Business; Google Marketing Platform; SEMrush; Ahrefs; HubSpot; Digital Marketing; LinkedIn; Social Media Platforms; Lean Six Sigma Black Belt; FINRA

Licenses: California Real Estate License, DRE# 02159155

Former Licenses: FINRA Series 7, 63