


# Sarah Mayo

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## Summary

As an investor relations / client operations leader in the fintech / alternative investments space, with my background in B2C marketing, user experience, and product development strategy, I'm driven by results. I believe the best approach to delivering a world-class client experience is one that maintains a consistent focus on transparency and empathy.

I have an excellent reputation for digging in and solving problems, collaborating cross-functionally, and systems-thinking vision. My forte is seeing complex projects from the point of ideation to execution, with attention to efficiency, scalability, and future-proofing. Big fan of fast-paced startup environments, "wearing lots of hats", keeping the workplace fun, and the Oxford comma.

I'm passionate about progressing the causes of equity, diversity, and inclusion in the workplace. I lead with intention and empathy. Personal values that are most important to me include honesty and integrity.

I can be reached via [li.sarah.mayo@gmail.com](mailto:li.sarah.mayo@gmail.com). I welcome opportunities to mentor and support women in the unique ways we need to build rewarding careers in industries where we are underrepresented. I'm interested in roles where we can work together on expanding access to alternative investments.

## Experience

### Director of Member Experience

Sweater

Feb 2022 - Jan 2023 (1 year)

#### LEADERSHIP

- \* Hired and trained Sweater's first Member Experience team.
- \* As member of Leadership Team, contributed to regular strategy sessions.

#### INVESTOR RELATIONS & COMMUNITY BUILDING

- \* Raised \$10M+ in industry-first venture capital interval fund open to non-accredited investors in 6 months.
- \* Met 1:1 with dozens of prospective investors to conduct discovery and develop strategy.
- \* Developed and hosted several series of digital events, such as "ask me anything" sessions, office hours, due diligence-sharing webinars, and collaborative flywheel acceleration discussions.
- \* Created body of knowledge to address frequently asked questions, including 100+ email response templates and 40+ knowledge base articles.
- \* Prepared email and SMS communications to provide investor community with regular updates about fund's portfolio companies.
- \* Collaborated on campaigns to drive community engagement with portfolio companies.
- \* Launched Sweater's first newsletter.

#### SYSTEMS / TECHNOLOGY

- \* Implemented Hubspot as CRM (including build-outs of Marketing, Sales, Services, & Operations Hubs).
- \* Integrated Aloware via API into Hubspot for seamless communication capabilities across email, phone, and SMS.
- \* Built 70+ workflows to automate marketing & sales operations, customer support, data management, and other manual tasks.
- \* Collaborated with Product & Engineering team on design of new features and UX in mobile app environment.
- \* Documented, internally escalated, and tracked resolution of product defects.

#### OPERATIONS

- \* Worked with external legal & compliance to develop anti-money laundering and "Know Your Customer" operating policies.
- \* Worked with transfer agent to establish protocols for transfers of assets, share redemptions, distributions, and data maintenance.



### Head of Investor Relations

#### Modiv

Dec 2020 - Feb 2022 (1 year 3 months)

#### INVESTOR EXPERIENCE

- \* Designed and implemented end-to-end investor experience, from initial nurture email drip campaign to onboarding to routine ongoing management and expansion campaigns.
- \* Hosted quarterly earnings calls and bi-weekly new investor introduction webinars.

#### SYSTEMS MANAGEMENT

- \* Implemented Hubspot as CRM and marketing/sales automation platform and Aloware (3rd-party API-integrated software) for calling, SMS, and ringless voicemail tools – increased outreach capabilities from ~250 personal touches/week to ~7,500+/week.

#### LEADERSHIP

- \* Managed and coached Investor Relations team through challenging period for investors, including some loss in portfolio value in aftermath of COVID-19, reduced dividend, and changes in investor eligibility.
- \* Served on Growth Committee overseeing rebrand, corporate strategy, and investor messaging.



### Head of Investor Relations

#### CrowdStreet

May 2020 - Nov 2020 (7 months)

#### CROWDFUNDING & INVESTOR RECRUITMENT

- \* Led on strategy and managed Investor Relations team that fundraised \$730MM+ for 160+ private equity CRE offerings over 16-month period (including four \$20MM+ and 18 \$10MM+ offerings).
- \* Onboarded 110,000+ new investors over 3-year period, of which 6,500+ completed 25,000+ investments.

#### INVESTOR EXPERIENCE

- \* Overhauled marketing strategy for Marketplace offerings, including designing series of HTML-based email templates, A/B testing, analyzing outcomes, and overseeing roll-out -- led to 21% increase in webinar registration.

- \* Created 40+ strategic email marketing campaigns -- increased average open rate from 28% to 37% and click rate from 1.76% to 2.64% over 6-month period.
- \* Designed routine investor outreach program -- reduced offer churn from 37% to 12% over 6-month period.
- \* Led experiment-based webinar improvements -- increased attendance rate from 45% to 58% over 6-month period.
- \* Initiated "evaluation period" to better manage oversubscription problem -- established new industry norm.
- \* Integrated AI chatbot tool on website -- provided more accessible services at reduced cost.

#### CONTENT CREATION & INVESTOR EDUCATION

- \* Wrote 10+ educational articles to support specific timely objectives.
- \* Created knowledge base with 30+ investor help and how-to articles.
- \* Invited to sit on panels to educate the public about investing in private equity CRE.

#### OPERATIONS & TECHNOLOGY MANAGEMENT

- \* Adjusted team member job assignments to keep pace with dynamic business needs.
- \* Developed and documented standard operating procedures to aid in new employee onboarding and ongoing reference.
- \* Participated in requirements and QA testing for product defects and new features.

#### LEADERSHIP

- \* Compiled and presented data highlighting KPIs to identify trends and inform strategies for improving results.
- \* Managed team of 6 Investor Relations professionals.
- \* Recruited, interviewed, and hired strong candidates for team openings, with focus on DEI goals.

### **Sr. Manager, Business Operations (IR)**

CrowdStreet

Feb 2019 - May 2020 (1 year 4 months)

### **Investor Relations Manager**

CrowdStreet

Aug 2018 - Feb 2019 (7 months)

### **Sr. Investor Relations Coordinator**

CrowdStreet

Aug 2017 - Jul 2018 (1 year)

### **Research Coordinator / Supervisory Analyst / Registered Principal**

D.A. Davidson Companies

Aug 2016 - Aug 2017 (1 year 1 month)

REGULATORY COMPLIANCE

- \* Achieved designation as Registered Principal with FINRA Series 7, 63, 87, and 24 licenses within a period of seven months.

## COLLABORATION

- \* Edited and published equity research reports under extremely rigorous time constraints.
- \* Supervised analysts and associates to ensure compliance of product with regulatory requirements.

## OPERATIONS

- \* Automated and streamlined a system of 14-year-old Excel spreadsheets to reduce redundancy and inefficiency through macros and improved structuring.

## LEADERSHIP

- \* Prepared and delivered a departmental writing workshop to institute a brand-consistent style and reduce common errors.



## **Senior Research Editor & Supervisory Analyst**

### CI Capital Holding

Nov 2015 - Jul 2016 (9 months)

#### PUBLICATIONS MANAGEMENT

- \* Edited copy for and formatted equity and macroeconomic research publications under tight deadline conditions, including thematic, sector, and company reports, marketing presentations, roadshow pitches, and a daily news roundup with analysis.
- \* Monitored department-wide production workflow, balanced priorities/quality/speed to market, and published reports via CRM for distribution to clients.
- \* Saw our research publications to international ranking by the Extel Survey for 3 consecutive years, increasing our rank each year.

#### SYSTEMS MANAGEMENT

- \* Oversaw set-up, customization, testing, and launch of a Salesforce-based CRM and research distribution platform and provided ongoing administration.
- \* Analyzed client interactions and product effectiveness through CRM data insights.
- \* Designed strategic product-/client relationship-improvement programs.
- \* Created a database to track KPIs for our coverage universe and top 250 MENA stocks by market cap.

#### CONFERENCE PLANNING

- \* Helped plan the largest series of Egypt-focused equities conferences in Cairo, London, New York, and Cape Town.
- \* Provided support and coordination of a complex operation spanning continents and timezones.
- \* Designed publication covers, conference branding, and other collateral.

#### LEADERSHIP & PEOPLE MANAGEMENT

- \* Mentored peers on writing best practices and facilitated a three-day team-wide writing workshop.
- \* Provided ongoing training for Research and Sales staff on CRM, database, and templates.
- \* Recruited, hired, trained, and managed 2 direct reports.
- \* Promoted twice in 4 years from Research Editor.



## **Senior Research Editor**

### CI Capital Holding

Nov 2014 - Nov 2015 (1 year 1 month)



## **Research Editor**

CI Capital Holding

Jan 2013 - Nov 2014 (1 year 11 months)



## **Teacher**

Arab Academy for Science, Technology and Maritime Transport

Sep 2012 - Jan 2013 (5 months)

- \* Worked concurrently in the American Department of AAST's High School Division and the Technical & Vocational Institute as a teacher of students ages 15-40.
- \* Researched, developed, and taught curricula for grade 10 English, grade 9 social studies, and conversational English courses.
- \* Set performance benchmarks for students and monitored their progress to ensure their success.
- \* Participated in professional development workshops.
- \* Successfully completed classroom observation process and saw AAST through accreditation for the American diploma.



## **Teaching Assistant**

North Dakota State University

Aug 2011 - Dec 2011 (5 months)

- \* Prepared and delivered five substantive lectures over the course of one semester of POLS 120: Terrorism, taught by Professor Jarret Brachman.
- \* Organized and led group study sessions.
- \* Engaged with students on a one-on-one basis.
- \* Designed, administered, and graded writing assignments and wrote portions of the exams.



## **Head Teacher**

mini Academics

Sep 2009 - Jun 2010 (10 months)

- \* Prepared lesson plans, organized children's learning environment, and implemented Montessori teaching techniques.
- \* Taught a classroom of 20 non-native English-speaking children in a language-immersive setting.



## **Marketing & Operations Assistant**

jade presents

Jun 2005 - Jun 2009 (4 years 1 month)

- \* Designed grassroots marketing campaigns using social media.
- \* Purchased advertising in radio and print and oversaw accounts payable.
- \* Ran point on concerts in a venue with capacity of 2,500+, liaised with all involved parties including client (performer and staff), venue operator, security personnel, and Jade Presents team.
- \* Managed mailing lists for clients, customers, and internal team.
- \* Converted old paper records system to digital and designed self-calculating spreadsheets to increase accuracy of records and ease of use.



## **Administrative Assistant**

Center for Nanoscale Science & Engineering

Aug 2007 - Jan 2009 (1 year 6 months)

- \* Maintained and managed fringe benefits, PTO, and sick-leave spreadsheet records for 65+ full-time employees.
- \* Monitored personnel's access for a secure building, administered access requests, and kept updated records.
- \* Oversaw recruitment for an average of 10+ positions per month.
- \* Created a fully-automated procedure to allow potential employees to apply for positions online.
- \* Managed mailing lists and listservs.



## **Intern**

**National Council on U.S.-Arab Relations**

May 2008 - Aug 2008 (4 months)

- \* Produced research used in panels and publications.
- \* Transcribed notes and speeches into electronic format.
- \* Participated in professional development seminars.

## **Education**



### **North Dakota State University**

Bachelor of Science, Political Science, International Studies

2006 - 2012



### **Arabic Language Center**

Intensive Arabic Program

2009 - 2009

## **Licenses & Certifications**



**Series 7 - FINRA**

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**Series 63 - FINRA**

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**Series 87 - FINRA**

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**Series 24 - FINRA**

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**Series 65 - FINRA**

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## **Skills**

Client Relations • Leadership • Strategy • Operations Management • People Management • Capital Markets • Marketing Strategy • Copywriting • Copy Editing • Project Management

## Honors & Awards

-  **1st Place, Student Research Paper Competition - Western Social Science Association**  
Mar 2012  
"The Rhetoric of Terrorism in American Discourse: A Critique of the Use of Adopted Arabic Terms by Political Elites", presented on a panel at the Western Social Science Association National Conference (Houston, Texas).
  
-  **Critical Language Scholarship - US State Department**  
2009
  
-  **CI Capital ranked 6th place in EMEA Equities Research - Extel Survey**  
May 2015
  
-  **CI Capital ranked 9th place in EMEA Equities Research - Extel Survey**  
May 2014
  
-  **CI Capital ranked 5th place in EMEA Equities Research - Extel Survey**  
May 2016
  
-  **Founder Award: For Entrepreneurial Achievement - CrowdStreet**  
Jan 2019  
"...works incredibly hard and is always willing to give a helping hand in difficult situations"  
  
"a major connector of many teams and always goes the extra mile to get things done and done well"  
  
"...methodical & speaks with intention. This approach enables her to tackle projects to full completion"  
  
"...She is a representative of all CS values in her hard work, integrity, and transparency"  
  
"An innovator - The CrowdStreet marketplace would not be what it is today without her"
  
-  **Woman of Influence (Innovator category) - GlobeSt Real Estate Forum**  
Jul 2020  
Since 1983, GlobeSt. Real Estate Forum has recognized a growing number of commercial real estate female professionals for their remarkable achievements. These talented individuals have personally influenced the market and have significantly driven the industry to new heights via their outstanding successes.

GlobeSt. Real Estate Forum intends to shine a spotlight on these influential professionals, by once again collecting nominations across a number of categories, spanning the entire Commercial Real Estate spectrum.