

# GABRIEL SANTOS, CPA

## Operations & Finance Leader | Scale-Up Specialist

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### EXPERIENCE

#### Head of Financial Strategy & Operations

##### Quadra5 Ventures

📅 2021 - Present    📍 Toronto, Ontario

- **Strategic Launch:** Orchestrated successful launch of SaaS platforms, gaining 2K+ business users and establishing initial onboarding & support frameworks
- **Effective Beta Testing:** Managed successful beta testing, incorporating user feedback to improve platform functionality and enhance early customer adoption
- **Agile Project Management:** Introduced Agile methodologies, leading to a 50% improvement in project timelines
- **Data Volume Management:** Successfully managed the extraction and analysis of data from 15 million businesses in the USA, ensuring accuracy and efficiency
- **Streamlined Operations:** Implemented Robotic Process Automation (RPA) solutions to automate routine tasks and processes, reducing manual workload by 30%, enhancing efficiency, and allowing the team to focus on strategic product improvements

#### Head of Finance, Operations & Supply Chain

##### Quadra5 Ventures

📅 2018 - 2022    📍 Toronto, Ontario

- **Launched Innovative Products:** Spearheaded the successful development and launch of 2 brands and 8 physical products, resulting in \$8M in sales
- **Market Expansion Strategy:** Developed and executed a market expansion strategy by establishing different business entities in the USA and Canada, as well as trademarks and various FDA and EPA registrations
- **Cross-Functional Collaboration:** Recruited, hired, managed, and coached a high-performing remote team of 7, fostering accountability and developing talent across operational functions
- **Vendor Collaboration:** Fostered strong relationships with vendors in Asia, resulting in a 30% reduction in lead times
- **Cost Optimization:** Diversified supplier base, reducing risk and increasing flexibility in procurement realizing a 20% cost reduction, while maintaining high-quality assurance
- **Optimized Portfolio:** Successfully led the phased discontinuation of low-performing products, streamlining the portfolio for a 30% gross margin gain

#### Senior Accountant

##### Deloitte

📅 2013 - 2017    📍 Vaughan, Ontario

- **Compliance:** Planned, prepared, and conducted reviews and compilations engagements
- **Advisory:** Provided advisory solutions to SME clients on business and financial conditions, identifying opportunities and driving value (e.g., \$20K+ in out-of-scope revenue)
- **Client Relationship:** Cultivated strong client relationships by delivering exceptional service and strategic advice, ensuring client satisfaction and retention
- **Project Management:** Planned fieldwork assignments, including budgeting and resource needs
- **Financial Reporting:** Prepared meticulous monthly and annual reports, ensuring accuracy, compliance, and insightful financial analysis for informed decision-making

### SUMMARY

CPA & ex-Deloitte turned entrepreneur, adeptly combining financial expertise with operational leadership for high-growth SaaS & DTC.

Track record: successful tech startup exit, scaled bootstrapped brands to \$8M revenue & optimized core SaaS platform operations critical for user success.

Specialized in transforming financial insights into tangible operational excellence & robust client service delivery, achieving 50% cost reduction via lean ops & strategic international vendor management.

### KEY ACHIEVEMENTS



#### Operational Excellence

- 45K SaaS users; built onboarding & engagement
- 50% faster SaaS projects with Agile
- 40% less manual work via RPA automation
- Cut ops cost 50%; lean/vendor Mgmt



#### Financial & Strategic Impact

- Generated \$8M in revenue through DTC brands
- Achieved 5x revenue multiple in startup exit
- Secured \$4M in seed funding for startup venture



#### Team Leadership & Development

- Built remote teams (to 12); drove accountability
- Managed cross-border operations (USA/Canada/Asia)
- B2B Account Manager Mentoring / boosted client retention
- Established international vendor networks; secured supply

### CORE COMPETENCES



#### Financial Leadership

- Financial Modeling & Forecasting
- SaaS Metrics Analysis (ARR, LTV/CAC)
- Budget & P&L Management
- Strategic Planning & Execution
- Risk Assessment & Mitigation

## EXPERIENCE

### Project Manager & Operations

#### Diversitoy Inc

📅 2011 - 2012 📍 Toronto, Ontario

- **Business Case:** Conceived and crafted the business case to define the project's scope.
- **User-Centric Design Implementation:** Led user-centric design implementation, defining product requirements and user stories to ensure alignment with customer needs and business vision.
- **Inventory Management:** Designed and projected an efficient inventory management process, overseeing its seamless implementation within the startup environment.
- **Operational Management Expertise:** Steered soft-launch operations for a pre-revenue startup, establishing foundational processes for product introduction and early user support.

### Head of Finance & Operations (Successful Exit)

#### Freela

📅 2005 - 2011 📍 São Paulo, Brazil

- **Strategic Growth:** Scaled SaaS marketplace from concept to profitable exit, achieving 5x revenue multiple in acquisition
- **Financial Planning:** Secured \$4M in seed funding through strategic financial planning and investor relations
- **Revenue Generation:** Built sustainable revenue model, scaling to 45K active users by developing operations for user acquisition, engagement, and support
- **Team Development:** Built and led a high-performing, cross-functional team of 12, establishing organizational structure, performance metrics, and a culture of operational excellence to support rapid SaaS scaling
- **P&L Management:** Managed complete P&L responsibility while optimizing unit economics and operational efficiency
- **Strategic Partnerships:** Negotiated key strategic partnerships driving market penetration and revenue growth
- **Exit Management:** Led complete exit process, including due diligence, valuation negotiations, and transition planning

### Partner - Account Manager

#### Processo Digital

📅 2003 - 2010 📍 São Paulo, Brazil

- **Digital Media Project Management:** Managed small-medium (\$25,000 - \$300,000) digital media projects for over 15 clients, collaborating with digital agencies and IT teams
- **Strategic Account Management and RFP Leadership:** Directed B2B client accounts, driving strategic account management from needs analysis to RFP leadership, achieving a 500% increase in deal closures
- **Cross-Functional Team Leadership:** Supervised and motivated cross-functional teams (up to 12), mentoring members in project delivery and client engagement to enhance service quality and B2B relationship management
- **Live Event Videos and Website Management:** Budgeted, forecasted, scheduled, and coordinated the production of hundreds of videos for renowned clients including Ericsson, Gillette, Procter & Gamble, and Unibanco

## EDUCATION

### Honours Bachelor of Commerce (H.B.Com.)

#### Seneca College of Applied Arts and Technology

📅 2014 📍 Toronto, Ontario

### Honours Bachelor of Public Relations

#### Faculdade Cásper Libero

📅 2006 📍 São Paulo, Brazil

## CORE COMPETENCES



### Operational Excellence

- SaaS Operations Management
- Professional Services (PS) Delivery
- Customer Success (CS) Strategy
- Process Automation & Optimization
- KPI Development & Performance Mgt.
- Cross-functional Team Leadership
- Vendor & Partner Management
- Team Mentorship

## SKILLS & TECHNOLOGIES

Data Analysis    Excel    HubSpot

Business Intelligence    Tableau

SQL    QuickBooks    NetSuite

Automation (RPA) Tools

ERP Systems (Conceptual & Practical)

GenAI & LLM (implementation of RAG)

## CERTIFICATION

### Chartered Professional Accountant (CPA)

CPA Ontario - good standing since 2016

### Google Business Intelligence Certificate

Coursera / Google

### Robotic Process Automation Professional Certificate

SS&C Blue Prism

## AWARDS



### 1st Place - National Competition ABRP

Brazilian Association of Researchers of Organizational Communication and Public Relations · 2006



### 3rd Place - Intel Capital / Desafio Brasil

Issued by Intel Capital & Getulio Vargas Foundation · 2009

## LANGUAGES

Portuguese ●●●●●●●●

Spanish ●●●●●●●●

Japanese ●●●●●●●●