

STEVEN T. MCKENZIE

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Transformational executive with 25+ years of experience scaling SMB and mid-market SaaS organizations, building repeatable go-to-market engines, and leading large, distributed teams across sales, marketing, operations, and customer success. Deep expertise in HCM and payroll distribution models, unit economics, and multi-product commercialization. Proven leader in private equity-backed environments, with experience integrating acquisitions, professionalizing operations, and preparing organizations for next-stage growth and public-company rigor.

Skills

- CRO & P&L Ownership
- Private Equity & Board Engagement
- IPO Readiness & Operating Discipline
- Talent Development & Culture Building
- Forecasting, Budgeting & Operating Cadence
- SMB & Mid-Market SaaS Go-to-Market
- HCM, Payroll & Workforce Technology
- M&A Integration & Post-Merger Scaling
- Revenue optimization
- Data-driven decision making

PROFESSIONAL EXPERIENCE

Chief Revenue Officer

COPILOTIQ / BIOFOURMIS, Nashville, TN

2024 - Current

- Senior executive responsible for revenue growth, go-to-market strategy, and commercial integration following the merger of CopilotIQ and Biofourmis. Worked directly with CEO, executive leadership team, and investors to scale a multi-product SaaS platform while improving margins and operating discipline.
- Full P&L ownership across Sales, Marketing, Customer Success, Partnerships, Pricing, and Commercial Operations. Generated \$50M+ in ARR
- Delivered 30% year-over-year ARR growth while improving gross margin and reducing customer acquisition cost by 50%
- Built scalable sales and marketing infrastructure designed for long-term growth and public-company readiness
- Regularly reported to the Board on ARR growth, pipeline health, CAC efficiency, and margin performance.

Vice President of Sales & Marketing

COPILOTIQ, Nashville, TN

2022 - 2024

- Owned end-to-end go-to-market execution across sales and marketing for a high-growth healthcare SaaS business, spanning SMB and mid-market segments.
- Built and led a 60+ person sales and marketing organization, consistently exceeding revenue targets (up to 120%+) and driving sustained pipeline growth through multi-channel demand generation.
- Scaled the business from ~800 to 25,000+ members, achieving 3,000%+ membership growth through improved segmentation, messaging, and execution.
- Reduced client acquisition costs by ~50% and cut new-hire onboarding time by ~90% through process optimization, standardized enablement, and self-service enrollment models.
- Strengthened alignment across sales, marketing, and customer success to support scalable growth, while coaching and promoting high-performing team members into leadership roles.
- Led monthly Executive sales forecasting, competitive analysis, and account assessments to inform product roadmap decisions and maximize sales potential.

Vice President of Sales, SMB, Virtual and NA

PAYCHEX

2011 - 2022

- Progressively promoted executive roles with increasing responsibility for SMB and mid-market HCM growth, operational execution, and large-scale people leadership across payroll, HCM, benefits, and HR technology.
- Led organizations ranging from 300 to 1500+ employees across 100+ markets
- Generated \$150M+ in annual revenue across SMB and mid-market HCM solutions
- Owned forecasting, budgeting, and operating cadence across multi-region teams
- Improved profit margins through disciplined expense management and productivity optimization
- Built scalable SMB sales models across field, inside, and virtual channels
- Achieved consistent top national rankings in sales and retention performance, earning recognition as a top-performing region and selection into Paychex EDGE, the company's executive leadership development program.

Regional Vice President

DFC GLOBAL CORPORATION, Berwyn, PA

2010 - 2011

Regional Vice President of Sales

*ARAMARK UNIFORM SERVICES,
Philadelphia, PA*

2003 - 2010

Education

Bachelor of Science in Finance

Virginia Tech University

BOARD & INVESTOR ENGAGEMENT

- Regular executive partner to CEOs, boards, and private equity stakeholders
- Experience operating in PE-backed environments with growth, margin, and exit expectations
- Proven ability to professionalize operating cadence and leadership teams in preparation for next-stage growth