

# Jon Lawrence

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## ENTERPRISE SaaS PRODUCT & COMMERCIAL EXECUTIVE

Senior product and commercial executive with 25 years in enterprise vertical SaaS across procurement, healthcare, K-12 and higher education, retail, hospitality, and supply chain — driving revenue growth, pricing and monetization strategy, and go-to-market execution for Fortune 500, federal, and public sector buyers across global operations. Technical fluency in platform and API architecture, built over 25 years of hands-on product leadership, grounds product strategy in engineering reality rather than roadmap theater. Two issued U.S. patents reflect a track record of differentiated innovation — workflow-specific IP that builds durable competitive moats for the platforms and customers that adopt it. Deep practitioner of customer-led commercial strategy with full P&L accountability across product, sales, and services — identifying where to compete and how to win through scaled discovery, rapid prototyping, and structured validation before committing engineering capital. Proven record reallocating R&D capital, modernizing legacy portfolios to cloud architectures, and driving AI-led product transformation tied to ARR expansion and margin improvement, including organization-wide agentic workflow deployment and measurable productivity gains. Trusted advisor to Boards and PE sponsors, translating complex technology strategy, regulatory compliance requirements, and multi-market operating constraints into clear, actionable growth narratives.

## OWNERSHIP MODEL & VALUE CREATION TRACK RECORD

Five distinct value-creation contexts across 25 years — fund-backed private equity, permanent-capital strategic acquisition, and public-company divisional governance — spanning founder-led turnarounds, AI-native operating model builds, M&A investment underwriting, and legacy-platform re-architecture, with successful outcomes across every model. Roper's permanent-capital model targets sustained double-digit annual EBITDA growth — pursued through a blend of top-line expansion, where each incremental revenue dollar carries outsized EBITDA leverage, and disciplined cost management. It's a value-creation calculus conceptually similar to a PE sponsor's underwritten return case, compressed into an annual cycle rather than a multi-year hold period.

| Company           | Ownership Model                                                                 | Sponsor                                       | Portfolio Profile                                                                                                 | Mandate                                                                                                                                                                                                | Outcome                                                                                                                                 |
|-------------------|---------------------------------------------------------------------------------|-----------------------------------------------|-------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| JAGGAER           | Private Equity — fund-backed, exit mandate                                      | Vista Equity Partners (Flagship Fund)         | Multi-core procurement SaaS · \$40MM R&D governance · 3 geographies                                               | AI operating model transformation from zero; R&D portfolio reprioritization                                                                                                                            | 100% GenAI adoption across 37-person org; 20–40% productivity gains in 90 days; ~20% of R&D capital redeployed                          |
| CBORD             | Permanent Capital — hold-forever, EBITDA-compounding mandate                    | Roper Technologies (NASDAQ: ROP)              | \$200MM B2B SaaS (pre-acquisition) · healthcare, K-12 and higher education, senior living · 25-person product org | Built the investment case for Roper's \$1.5B acquisition of Transact (a tuck-in 1.5x CBORD's scale, funded via Roper's M&A capital allocation); led post-acquisition product/engineering consolidation | Transact successfully integrated under the CBORD platform; tenure concluded on completion of product/engineering consolidation strategy |
| Oversight Systems | Private Equity — fund-backed, exit mandate                                      | Luminate Capital Partners → TCV               | ~\$20MM ARR · AI-driven compliance analytics · 16 federal agencies + Fortune 500                                  | Built product management discipline from founder-led stage; FedRAMP support                                                                                                                            | >25% ARR growth in one year                                                                                                             |
| NCR Hospitality   | Public Company Division — internal capital allocation, no acquisition mechanism | NCR Corporation (NYSE: VYX), \$600MM division | SMB and Enterprise hospitality channels; legacy, acquired, and developed architecture stack                       | Rebuilt value-selling methodology and SMB/Enterprise segmentation; built the board-level case to rearchitect platform around differentiated customer value                                             | Board and CEO approved doubling R&D investment (\$30MM → \$60MM); 20+ strategic technology partnerships secured                         |
| RedPrairie        | Private Equity — fund-backed, sequential exits                                  | Francisco Partners → New Mountain Capital     | \$100MM retail supply chain · full P&L across product, sales, services                                            | Pricing model transformation (license to subscription/ARR); platform modernization                                                                                                                     | 40% revenue growth; 2 of top 10 U.S. retailers won; successful sequential exits                                                         |

## AREAS OF EXPERTISE

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Private Equity Value Creation | P&L Management & Commercial Accountability | Pricing, Packaging & Monetization Strategy | AI-Driven Operating Model & Team Enablement | API & Platform Architecture Strategy | AI Commercialization & Agentic Workflow Deployment | Investment Case Development & Board/Capital Committee Advocacy | Cloud Modernization & Platform Refactoring | Healthcare & Public Sector SaaS | FedRAMP & StateRAMP Compliance Programs | Vertical SaaS Growth Strategy | R&D Capital Allocation & Investment Prioritization | Revenue-Linked Roadmap Prioritization | ARR Growth, Net Retention & Margin Expansion | M&A Origination, Investment Underwriting & Integration | GTM Strategy & Sales Enablement

## PROFESSIONAL EXPERIENCE

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### JWL Innovation Strategies, LLC, Atlanta, GA

11/2024 – Present

#### Founder & Advisor — AI-Driven Product & Operating Model Advisory

Providing selective advisory engagements to vertical SaaS companies on product strategy and operating model design while evaluating next operating role.

### JAGGAER, Raleigh, NC

03/2025 – 03/2026

*Vista Equity Partners Flagship Fund*

#### Chief Product Officer

Owned \$40MM R&D investment governance and commercial roadmap for a multi-core procurement SaaS platform serving commercial enterprises, U.S. state and local government, public higher education, and EU public sector across three geographies. Built the organization's AI transformation capability from zero — establishing the operating model, governance, and commercialization discipline that now define how the product organization ships AI-native capability, in an environment where no employees were previously authorized to use AI tools.

- **AI Operating Model Transformation:** Designed and operationalized a staged AI transformation roadmap (assistant → co-pilot → autonomous workflows), embedding AI into core procurement workflows while driving 100% GenAI adoption across the 37-person product organization — delivering 20–40% productivity gains within 90 days through structured AI workflows in customer discovery, requirements development, accelerated prototyping, and backlog management.
- **Process Automation at Scale:** Sponsored an autonomous translation workflow that replaced \$300K/year in outsourced localization across 26 languages — a proof-of-concept delivering a new language for under \$100 against a \$127K manual baseline, moved to full production within a single release cycle with no added headcount. Built autonomous AI agents monitoring EU legislative and procurement policy changes, surfacing six compliance-impacting regulatory changes eight months ahead of enforcement deadlines and eliminating two planned FTE hires — demonstrating a repeatable model for AI-driven regulatory change detection embedded directly into compliance workflows.
- **Investment Prioritization & Portfolio Governance:** Led cross-functional reprioritization of R&D investment across three core platforms, reversing a multi-year integration strategy by eliminating high-cost/low-value initiatives and redeploying ~20% of R&D capital within six months toward targeted manufacturing growth segments aligned to customer value — improving engineering velocity, sharpening ICP alignment, and strengthening customer retention sentiment.
- **AI Commercialization & GTM Validation:** Built a structured program to rapidly experiment, validate, and commercialize AI-driven capability — converting early-access design partners into paying customers, expanding from 2 to 11 engaged partners within 30 days, with full commercial conversion and 6 presenting validated use cases at the annual user conference.

### CBORD, Duluth, GA

07/2021 – 10/2024

*Roper Technologies (NASDAQ: ROP) Portfolio Company — Successful M&A Exit*

#### VP, Product Strategy

Led product strategy, commercial growth planning, and portfolio rationalization for a \$200MM B2B SaaS portfolio — prior to Roper's \$1.5B acquisition of Transact — serving healthcare systems, K-12 and higher education, and senior living, owning \$20MM R&D investment and a 25-person product organization across two major platforms. Served as named executive sponsor for two years, leading monthly and quarterly executive cadence that stabilized and expanded the strategic relationship with the largest integrated managed care consortium in the U.S.

- **Cloud Migration & Platform Modernization:** Owned the roadmap and business case for transitioning legacy on-premise platforms to secure SaaS architecture across thousands of healthcare and higher education locations — prioritizing which

capabilities moved first and building the organizational case for a multi-year investment that Engineering then architected and executed.

- **M&A Investment Case & Integration Leadership:** Built the investment case and underwrite for Roper's \$1.5B acquisition of Transact — a platform 1.5x CBORD's scale, acquired as a tuck-in under the CBORD umbrella via Roper's corporate M&A capital allocation — then led the post-acquisition product and engineering consolidation strategy, shaping which capabilities carried forward, consolidated, or were retired across the combined platform.
- **Portfolio & Margin Optimization:** Designed and executed a multi-year growth strategy driving >10% YoY organic ARR growth through quantified ROI modeling and disciplined capital allocation; rationalized 4,000+ SKUs to under 200, simplifying pricing and sharpening margin across the portfolio.
- **Channel Strategy & Technical GTM Integration:** Designed and executed a partner/channel growth strategy with major foodservice distributors including Sysco — building a white-label distribution model with supporting technical integrations for real-time ordering, receiving, and inventory management that expanded addressable market and accelerated deal velocity.
- **Portfolio Capital Discipline:** Made the deliberate call to harvest >\$1mm from the K-12 Horizon platform rather than commit further investment without a probable return — freeing capital to redirect toward higher-TAM, higher-growth segments of the portfolio.
- **Regulatory Compliance Infrastructure:** Sponsored StateRAMP authorization for the Online Transaction Processing platform and led FedRAMP investment evaluation for federal market entry, partnering with Security and Infrastructure leadership on certification path and commercial trade-offs.

## Oversight Systems, Atlanta, GA

07/2019 – 06/2021

*Luminate Capital Partners, Successful Exit to TCV — ~\$20MM ARR business*

### Vice President, Product Management

Built the product management discipline and commercial roadmap within a founder-led, AI-driven compliance analytics platform serving 16 federal agencies, including the Department of Veterans Affairs, and Fortune 500 commercial customers.

- **AI Platform Product Strategy:** Owned product roadmap and commercial packaging for the platform's core AI-driven spend auditing and detection capability, partnering with Data Science, Engineering, and a third-party AI provider to translate model output into customer-facing value — the foundation the COVID-response procurement product line was later built on.
- **Technical Partnership & Regulatory Architecture:** Supported FedRAMP certification with the platform listed on the FedRAMP Marketplace, partnering directly with Security and Engineering on the architectural and product tradeoffs required to operate credibly in a FedRAMP-governed environment.
- **Portfolio Expansion & Revenue Diversification:** Led product response to COVID-driven revenue contraction with two strategic bets — a white-label SaaS offering extending distribution through a major channel partnership, and a new procurement product line built on existing platform data to detect spend leakage — driving >25% ARR growth in one year.
- **Delivery Accountability & Operating Rigor:** Introduced a measurable "say:do" delivery ratio exceeding 95%, building the accountability structure and forecasting discipline that materially improved execution predictability and stakeholder confidence.

## NCR Corporation, NCR Hospitality, Atlanta, GA

10/2012 – 06/2019

*\$600MM division of NCR (NYSE: VYX) — Now NCR Voyix*

### Executive Director (2016–2019); Senior Director, Product Marketing & Solution Management (2012–2016)

Spent six years leading product marketing, solution management, and commercial strategy for NCR Hospitality, a \$600MM division of NYSE-listed NCR Corporation (now NCR Voyix) and the nation's leading hospitality solutions provider — spanning both SMB and Enterprise channels atop a technology stack built from decades of acquired, developed, and legacy architecture. Advanced from Senior Director, Product Marketing & Solution Management to Executive Director over the tenure, taking on progressively broader ownership of commercial strategy and platform investment direction.

- **Commercial Enablement & Pricing Strategy:** Built and led the product marketing and sales enablement function across SMB and Enterprise channels for the nation's leading hospitality solutions provider — developing competitive positioning, battle cards, commercial playbooks, and pricing frameworks that drove adoption across a cost-sensitive SMB segment and enterprise accounts, sustaining mid-90s GRR and strong NRR through value-based selling narratives.

- **Legacy Architecture Diagnosis & Board-Level Reinvestment Case:** Identified how an accumulating stack of acquired, developed, and legacy architecture was eroding the division's #1 market position, and built the business case to fund a complete re-architecture around differentiated customer value. Secured Board and CEO approval to double R&D investment (from \$30MM to ~\$60MM annually) toward a 3-year cloud SaaS strategy centered on consumer engagement, supported by 20+ strategic technology partnerships.

## **RedPrairie, Inc., Alpharetta, GA (now Blue Yonder)**

05/2000 – 09/2012

*Startup BlueCube Software sold to Francisco Partners with subsequent successful exit to New Mountain Capital*

### **Vice President, Retail Solutions (2009–2012); Progressive leadership roles (2000–2009)**

Held full P&L accountability for a \$100MM Retail Supply Chain portfolio across product strategy, sales, and global services — driving 40% revenue growth and securing 2 of the top 10 U.S. retailers and the largest UK grocer (>\$10MM ARR).

- **Pricing Model Innovation:** Pioneered the transition from one-time license and services revenue to subscription/ARR pricing models, requiring deliberate alignment across sales, services, and finance to prevent functional silos from optimizing against each other. Partnered directly with the CFO to build shared economic models demonstrating long-term margin advantages, securing cross-functional buy-in without mandating change.
- **Platform Modernization & Margin Protection:** Led portfolio-wide technology debt remediation requiring customer migration across the installed base, demanding cross-functional partnership with sales and services teams. Built value-based selling frameworks that reframed the migration as an improved customer experience, protecting margin while accelerating new sales pipeline.

## **EDUCATION & PATENTS**

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Education: B.S., Cornell University

Patents: U.S. Patents 10,115,094 and 11,126,984