RODOLFO MALDONADO

Director of Demand Generation · $107M Pipeline Owned · Built From Zero 5x · AI-Native Systems · Regulated B2B

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PROFESSIONAL SUMMARY

Demand generation leader who owns the pipeline number. Drove $107M in marketing-sourced pipeline and $22M closed-won at 27.57x return on ad spend across two lines of business, and held 98% monthly paid retention at a seed-stage fintech. Builds the system as well as runs it: co-authored the attribution framework Sales agreed to, stood up paid, lifecycle and answer-engine channels from zero, and now runs a full marketing function on AI agents. Five times the first marketing hire.

CORE COMPETENCIES AND SKILLS

AI	AI agent workflows · Generative and Answer Engine Optimization
STACK	Salesforce · 6sense · Demandbase · GA4 + GTM · Meta Ads · Google Ads
METHODS	Pipeline attribution · Funnel economics · ABM · Segmentation
CHANNELS	Paid Search · Paid Social · Lifecycle Email · Webinars · Field marketing

PROFESSIONAL EXPERIENCE

Founder, gRO (Growth Revenue Optimization)

Redwood City, CA | 04/2026 – Present

AI-native growth consultancy · 7 client engagements across 7 verticals · full funnel owned end to end

- **AI-native operations.** Runs **7 client engagements across 7 verticals** with no team, on self-built automation, **15 AI subagents** gating every deploy and ad launch.
- **Seven accounts, no team.** Operates **7 client engagements across 7 verticals** solo, including a brokerage's renter-acquisition engine under Meta's Housing rules, **44% form completion**.
- **Channel decision.** Scanned **2,762 businesses** into a **651-record qualified dataset**, then killed the channel before spending, a hand audit put false positives at **17%**.

Senior Lead Generation Manager, Kestra Financial

Austin, TX | 12/2022 – 04/2026

$103B+ AUA · 1,700+ advisors · $1M+ budget · promoted to Senior 11/2024

- **Pipeline.** Built the demand engine from zero across two lines, **$107M sourced pipeline, $22M closed-won, 27.57x ROAS**, 2024 Stevie for Marketing Disruptor of the Year.
- **Sales partnership.** Co-authored the **Marketing-Originated vs Influenced framework** with Sales in quarterly business reviews, the artifact that standardized pipeline-credit accounting.
- **Funnel economics.** Cut **cost per opportunity 56% ($32.5K to $14.25K)** and lifted **MQL-to-Opportunity conversion 32%** on 2,900 MQLs, 2024 ANA B2 Award for Lead Generation.
- **Named-account pipeline.** Ran tiered ABM, 1:1 into **Goldman Sachs PFM and First Allied** and 1:many by region on intent scoring, **34% of leads, 26% of opportunities**.
- **Sales alignment.** Put Sales and Marketing on **shared funnel-stage definitions**, then automated the lead hand-off from **Sitecore into Salesforce**, **sales opportunities up 33%**.

- **Webinar program.** Launched the **Lead Acceleration webinar series** for advisors weighing wirehouse transitions on a low-cost model, compliance through follow-up, **115 MQLs**.

Vice President of Growth Marketing, Freeman Capital Investments

Austin, TX | 05/2020 – 12/2022

Seed-stage WealthTech / B2B2C SaaS FinTech; hired by the CEO

- **Reporting stack.** Consolidated **HubSpot, Google Analytics and Tag Manager** into one reporting layer attributing cost, pipeline and revenue by partner, replacing three disconnected tools.
- **First marketing hire.** Joined a seed-stage wealth platform as employee-one in marketing and built to **10,089 members and $100K in annual recurring revenue at 98% monthly retention**.
- **Lifecycle engagement.** Lifted email engagement **220%** by rebuilding sequencing around buyer stage rather than calendar cadence.

Senior Channel Marketing Manager, Avantax Wealth Management

Dallas, TX | 10/2018 – 05/2020

$67B+ client assets · 4,200 affiliated advisors · $1M+ budget

- **Revenue and CAC.** Reversed underperforming B2B acquisition, converting **$230M in new client assets** and cutting **cost per lead 61%** in under six months.
- **Advisor recruiting.** Ran the advisor recruiting funnel end to end, contributing to **$1.2B in recruited assets across ~465 advisors** and owning C-suite channel reporting.
- **Offer testing.** Sequenced re-permission and offer variants against a **$600M dormant pipeline**, reactivating **40%** where an untested single send had failed.

AVP Marketing Communications Officer - Consumer Banking, Broadway Bank

San Antonio, TX | 09/2014 – 09/2018

$3.8B community bank · 40 banking centers · $1.2M budget

- **Revenue growth.** Scaled social advertising alongside paid search for auto loans, **$3M to $24M**, **3x AMA Crystal** for search, consumer and direct mail.
- **Go-to-market.** Held formal **Go-To-Market Campaign Management** accountability, repositioning the home-loan program onto better-fit channels to lift it **420% in two quarters**.
- **AI deployment.** Deployed a production **AI and Machine-Learning cross-sell platform** in **2017**, **2,834 AI-conducted interviews** to **9% conversion against a 5% average**.

EDUCATION AND CONTINUOUS LEARNING

Education: Bachelor of Business Administration Marketing (BBA), University of Texas at San Antonio

Languages: English and Spanish (native) · **Certifications:** Google Ads Certified · Salesforce Trailhead (CRM, Marketing Cloud, Einstein) · Anthropic Claude Code agentic development

Awards: 2024 ANA B2 Lead Generation, SMB · 2024 Stevie x2, Marketing Department of the Year and Marketing Disruptor of the Year · 2024 Drum B2B Marketing Strategy shortlist · 2024 Wealthmanagement.com Digital Marketing Campaign of the Year finalist · 3x AMA Houston Crystal: Search Engine Marketing and Business-to-Consumer, 2017, and 2D Direct Mail, 2016