

Bill Baumgarth

AI-Fluent Operator | I build and run revenue systems for sales teams

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SUMMARY

On the same 4,622 leads, a leading data provider's records had phone numbers for 8%; my pipeline returned them for 83%. I build and run revenue systems like that for sales teams, across revenue operations (RevOps) and go-to-market (GTM): lead pipelines, data enrichment, outbound, workflow automation and customer relationship management (CRM) intelligence. At Flatiron Realty Capital, a nationwide private lender, I ran business development and marketing and built 22+ systems in 12 months alongside it. I've done the same for clients through my own firm, Capital Catalyst, including 9 institutional meetings booked in one month for a \$1B niche credit firm. I design each system, direct AI to write most of the code, and measure results against the data provider's output or the prior period. I started in sales, so I build for the person who has to use it.

WORK EXPERIENCE

Founder & AI-Fluent Operator - Revenue Operations and AI Automation

Capital Catalyst LLC, Westchester County, NY (remote) | Sep 2023 - Present

- **Client results:** booked 9 institutional meetings in one month for a \$1B niche credit firm, with CEOs and CIOs at private-credit firms from \$10B to €42B in assets under management (AUM). An executive-search client's recorded meetings rose from 3 a month in Dec 2022 to 39 in Oct 2024, a team result. Alpha Partners has kept me on as its business development (BD) and marketing consultant since my analyst year there ended; I also produced its investor explainer video.
- **LLC owner resolution:** property lists go in; the people behind the owning LLCs come out, with phone numbers, verified emails and social profiles where found. A deed shows only a shell company, so the pipeline checks 27 state business registries to find the actual owner. A panel of AI models double-checks every match, and every email is verified before delivery (about 28% come back dead).
- **Compliance built in:** phone lists scrubbed of serial Telephone Consumer Protection Act (TCPA) litigators; leads screened against the NPLA prohibited-borrower list (7,100+ names) and flagged, never deleted; no paid processing past 50 rows without a cost estimate on screen.
- **Open source:** SuperArchitect (Apr 2025), a Python command-line tool that orchestrates Claude, GPT and Gemini to turn one planning question into a full architecture plan. The zero-budget launch drew 100K+ views and 70+ GitHub stars.

Head Operator (Head of Business Development and Marketing) - Sales Operations, Business Systems and Automation

Flatiron Realty Capital, New York, NY | Aug 2025 - Aug 2026

Nationwide private lender with \$2B+ deployed across 2,400+ loans (Flatiron's life-to-date figures). I ran BD, marketing and sales operations, led and trained a two-person marketing team, and was the only person at the 30+ person firm building technical systems: 22+ systems in 12 months, alongside the full-time role. Firm result: loan volume went from \$40M when I joined to \$120M a year later.

- **Beat a leading data provider head to head:** on the same 4,622 leads, the provider's records had phone numbers for 8.0%; my pipeline returned them for 83.4%, including 3,505 leads the provider had none for (numbers found, not call-verified), because each record gets its own search instead of one bulk query.
- **Opened up a CRM with no API:** pulled all 368,683 CRM records out through the screen, then ran a multi-agent AI pass over 253,233 borrower profiles that filled about 1.4M empty fields from half-written notes (where they invest, ground-up or fix-and-flip, last contact). Result: 65.8% of borrowers with a concrete next step and 7,798 dormant borrowers back on outreach, for \$20.67 of run cost (about \$25,000 at vendor rates).
- **Built a lead engine from public records:** 26,371 contacts delivered at about 5 cents of API cost each, 18,861 (72%) of them new to the database at delivery. The total includes a county-permit list no vendor sold (4,203 leads with phone numbers). Separately, 56,568 Instagram posts were screened down to 582 developer leads.
- **Rebuilt outbound email:** 92.63% of 42,438 send requests accepted by receiving servers (Apr to Jun 2026). Sent 68,851 personalized emails to 49,300 recipients from 1,800+ body templates and 8,153 subject lines; 4 in 10 cited a real deal the firm had closed near the recipient, and each new close went automatically to investors active in that market. The system served 21 salespeople.
- **Cut the pre-call hunt from minutes to seconds:** shipped PersonSearch, a lookup app the sales floor used live on calls. AI agents read signatures, documents and public records and return the owner and a phone number in about 30 seconds, down from 4 to 15 minutes.
- **Scored who would pick up:** an AI scorer ranked 49,345 stale contacts into call lists. Checked against one rep's logged calls, the top of the list answered 30.8% of the time vs 7.5% at the bottom.

- **Moved social from paid boosting to organic video:** audited the ad program (\$7,741 on 40 boosted posts for 216 direct-message conversations, about \$36 each), then stopped boosting and switched to posts and reels made on AI video tools. The first 16 unboosted posts drew 4.6x the views of the 16 before (27,018 vs 5,927; two reels made up 65%), and the best reel's 10,227 views beat the paid program's average of about 2,425 a post. Also rebuilt the brand and the company website.
- **Data quality controls:** majority-vote AI panels with human-in-the-loop fallback; prompt changes passed regression evals on holdout sets before shipping.
- **Regulatory:** found a required state registration the firm had never held, and led it through first-time registration and compliance (2026).

Investor Relations / Operations Analyst

Alpha Partners, New York, NY | Sep 2022 - Sep 2023

- **Investor meetings per conference rose from about 5 to 85** at the last one I ran (17x), and the managing partner's qualified-meeting flow at least quadrupled over the year, with institutional limited partners (LPs) across Asia-Pacific and the Americas, for a \$1B AUM growth-equity fund.
- **Led investor materials:** pitch decks, the annual LP meeting presentation and video, and new-fund-launch collateral; ran request for proposal (RFP) and due diligence questionnaire (DDQ) processes end to end.
- **First automation work:** scripts that resolved CRM data discrepancies, investor-targeting and LP-geography visualizations, and early GPT experiments in the investor relations workflow.

Business Development Associate

NuPay Technologies, Ohio | Jul 2021 - Aug 2022

- **Sourced the company's original \$5 million investment and its CTO** for an art-focused blockchain platform; recruited more artists than any other salesperson, by a wide margin.
- **Ran a 40,000-member community** across social channels and the paid ad strategy; won buyers, artists and investors through direct social outreach; began building GPT-3-powered web apps in 2021.

EDUCATION

MSc, History of International Relations

London School of Economics (LSE) | Oct 2019 - Oct 2021

BA in Economics, cum laude (economics GPA 3.8/4.0)

Fordham University | 2015 - 2019

Quantitative concentration: econometrics, statistics and economic modeling.

General Course, visiting year during the BA

London School of Economics (LSE) | Oct 2017 - Aug 2018

SKILLS

- **Revenue systems:** lead pipelines and waterfall enrichment (Enformion, Trestle, Serper.dev); LLC ownership chains and county property records; entity resolution and deduplication; AI lead scoring; CRM auditing and segmentation at scale (MongoDB-backed); lead extraction from Instagram, LinkedIn, county records and deeds
- **Outbound and marketing operations:** email deliverability and sender reputation (SendGrid, MillionVerifier); SMS infrastructure (Twilio, A2P 10DLC registration); organic social and short-form video; ad-program audits and budget reallocation
- **Experimentation:** matched head-to-head comparisons on identical inputs (same leads, two methods); regression evals on holdout sets for prompt changes; scorer checks against logged outcomes (top vs bottom of list); before-and-after comparisons with cost per result; published definitions and caveats for each reported metric; econometrics and statistics coursework
- **AI automation and large language model (LLM) systems:** production LLM pipelines with model routing (OpenRouter; DeepSeek, Claude, GPT, Gemini, Grok); majority-vote LLM-as-judge panels with human-in-the-loop fallback; agentic retrieval-augmented generation (RAG) that verifies and re-queries; Model Context Protocol (MCP) servers with permission-scoped tools; multi-agent orchestration; structured outputs and tool calling; 93% prompt-cache hit rate; daily agentic coding (Claude Code, OpenAI Codex); using LLMs daily since the GPT-3 Playground (2021)
- **Technical / Build:** Python (pandas, async); API integrations; idempotent, incremental pipelines; browser automation and scraping (Playwright, Selenium, Apify, Scrapfly); Streamlit, Flask; SQL (PostgreSQL, SQLite), MongoDB, Redis, pgvector; nginx and Vercel hosting
- **Compliance:** TCPA litigator scrubbing (DNC.com); NPLA prohibited-borrower screening; do-not-contact and consent management; first-time regulatory registration
- **Domain:** real estate lending (fix-and-flip, ground-up, DSCR, bridge); private equity (PE), venture capital (VC) and private credit (IRR, MOIC, NAV, 13F filings)