



Red Oak Announces Strategic Leadership Hires Across Marketing, Technology, Program Management and Revenue Operations

Strengthens Senior Team to Scale Compliance Connectivity Platform and Deliver Greater Value to Financial Services Industry

AUSTIN, TX, UNITED STATES, July 10, 2025 /EINPresswire.com/ -- Red Oak, the industry's only

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Cathy Vasilev

Compliance Connectivity Platform, today announced the appointment of Allison Dancy as Chief Marketing Officer, joined by key leadership hires across revenue operations, engineering and program management. These additions deepen Red Oak’s functional expertise and reinforce the company’s ongoing commitment to growth, innovation, and clients.

Allison Dancy joins Red Oak as Chief Marketing Officer, reporting to CEO Dave Dutch. With more than 20 years of enterprise marketing leadership across SaaS, fintech and

services, Dancy will drive brand positioning, go-to-market strategy, and pipeline acceleration as Red Oak continues to scale its platform.

Prior to Red Oak, Dancy held CMO positions at Billd, Kibo Commerce and OneTouchPoint, where she led corporate rebrands, product launches, and strategic acquisition integrations. Her record of aligning marketing performance with commercial outcomes makes her a natural fit for Red Oak’s next phase of expansion.

“Allison brings a clarity of vision and a precision of execution that build on Red Oak’s market leading position,” said Dave Dutch, CEO. “She understands how to activate marketing as a growth engine—especially in highly regulated industries—and we are fortunate to have her on the team.”

In addition to Dancy’s appointment, Red Oak recently welcomed:

□ Julie Springer, Vice President of Program Management, bringing over 15 years of experience in strategic execution, cross-functional leadership and operational delivery across technology and

marketing domains. Known for her data-driven approach and customer-centric mindset, Springer previously held leadership roles focused on growth enablement and marketing operations.

□ Stacey Ledbetter, Director of Revenue Operations, a SaaS and technology executive with over a decade of experience in operational excellence and go-to-market transformation. Ledbetter most recently led business operations at Brightly and PointClickCare, where she executed high-impact strategies that drove measurable improvements in sales efficiency and revenue recognition.

□ Christy Stout, Director of Engineering, a seasoned technical leader with extensive experience driving innovation and engineering team performance. Before joining Red Oak, Stout was Director of Engineering at Bazaarvoice where she led a team of 50 engineers across frontend, backend, data, and analytics to deliver scalable web applications, optimize data pipelines, and drive AI/ML adoption.

"Seeing this caliber of leadership choose Red Oak is deeply gratifying," said Cathy Vasilev, Red Oak Co-Founder and Chief Engagement Officer. "What started as a focused compliance technology solution has evolved into a comprehensive platform powering connectivity and scale for the financial services ecosystem. These leaders will help us move even faster—and serve our clients even better."

These appointments follow Red Oak's recent acquisition of 4U Platform and reflect the company's intent to scale with purpose—aligning high-performing leadership with the needs of investment firms, insurance providers and wealth management companies navigating regulatory complexity and operational risk.

As the platform continues to expand its reach and functionality, Red Oak remains committed to its core mission: delivering compliant, connected, and customizable AI-powered solutions that accelerate time-to-market and enable confident communication at scale.

About Red Oak

Red Oak is the industry's only Compliance Connectivity Platform, unifying best-in-class compliance technology, seamless content distribution, and ongoing supervisory monitoring to streamline regulatory workflows for investment firms and wealth management companies globally. Serving over 2,300 firms worldwide, including almost all of the top 20 asset managers, Red Oak's suite of 17a-4/WORM compliant solutions reduces inefficiencies, mitigates risk, and accelerates time-to-market for financial professionals. For more information, visit www.redoak.com or connect on [LinkedIn](#).

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