

**BESPOKE SEARCH GROUP**  
**CTO**

**SUMMARY AND PROFILE**

**Chief Technology Officer**

CTO with diverse cross industry experience achieving millions in new revenue, growth, with focus on transformation, innovation, entrepreneurship, client relationship & technical expertise working with global Fortune 500 & private Equity businesses. Recognized thought leader & successful builder of Application Development & PMO/Product teams with transformation to Agile as well as acting CISO. Creates & enables solutions, business strategies with tactical alignment of technology processes leveraging agile as well as Dev Ops. Demonstrates ability to effectively manage & interact with diverse resources in terms of skills, culture, & personalities for the mentoring, design, architecture, & development of business technology solutions. Recognized for strong leadership, cross area collaborative partnership, & communication skills, including board level, championing the voice of the customer.

**Core Competencies**

Strategy, Project, Program, Management  
Finance & Cross Industry Solutions  
Agile / SAFe Methodology / DevOps  
Data Architecture / Business Analytics  
API / Micro services / CRM – Salesforce  
AI / ML / RPA

Thought Solution Leadership & Innovation  
Cloud / SaaS/ CISO / Zero Trust Security  
Architecture, Design & Development  
Service Desk Management  
KPI / Success Metrics  
Vendor Management

**CAREER HIGHLIGHTS**

- Enabled \$50 million in new revenue growth at Confidential, 40% increase in marketplace partner submissions, and 200K+ savings in 3rd party data calls with complete re-platform of FinTech business from monolithic to microservices with new UI/UX customer journey. Architected overall solution for multiple tracks to transform across business areas.
- Received 2021 CUSTOMER Magazine Product of the Year Award for X
- \$150 million annual growth with new innovative BPO virtual call center platform with integrated self-service content achieving 65% agent call deflection, virtual house call tools, and customer relationship management.
- Contributed to \$100M+ in proposal wins as well as \$5M+ in reseller sales with a focus on X Health Information Management System.
- \$50M+ revenue generation and new product offerings by leading successful migration to New Publishing Platform and implemented Data Exchange Platform.
- \$24 million revenue engine with launch of Tech Solutions ecommerce site for any device support for direct to consumer and small medium business offerings.
- \$15M in cost savings within one year through reduction of field project hours by 25,000+
- \$1M in new sales growth attributed to new ERP / CRM Salesforce capabilities and productivity efficiencies.
- Identified solution and migration to complete Cloud Platform for proprietary cross business area applications, new API integrations, data, and security. Annual cost savings of over \$1million, plus meeting business demand of dynamic scalability and flexibility for innovation. Already achieved 800% performance improvement and 400% in environment error rate reduction.
- \$800K in year 1 return for Robotic Process Automation of tasks across multiple business areas at X.
- Performing as CISO for two companies in which I completely re-architected security framework for multi layers of hardened defense & data privacy with Zero Trust, Ransomware, SIEM, SOC, & AI security solutions.
- Drove digital transformation in three companies improving speed and volume of transactions and cost to run.
- Established and cultivated large global distributed teams (100+) of Subject Matter Experts focused on development, deployment, standardization, and enablement of Cloud, standard tools, methodology, reusable assets, and intellectual capital. Managed multiple offshore teams and strong negotiation of terms.

**PROFESSIONAL EXPERIENCE**

**Confidential, FinTech PE-backed**

**Chief Technology Officer**

**May 2021 - present**

Rebuilt technology team to re-platform a fast-growing FinTech business. Drove major digital transformation enabling faster loan transactions, increased marketing reach and profitability as well as hardened security.

- 30% increase in Sales leads & conversion with Salesforce modernization, & optimization of workflows

- Leading product/project roadmaps and new prioritization processes to achieve highest business impact.
- New advanced analytics for updated risk scoring models and optimized marketing spend for lower cost of customer acquisition, as well as increased direct sales loan originations. Kicked off AI pilot for new risk and marketing analytics capabilities.

**Confidential, Nasdaq Listed  
Chief Technology Officer**

**2019 - 2021**

Spearheaded innovation and growth strategies for internal, enterprise-customer, B2B, SMB and D2C offerings, harnessing my experience in digital transformation and delivery excellence. Responsible for product, development engineering, and infrastructure teams.

- 1 million in year one cost savings projected by reducing infrastructure and software costs by architecting hybrid cloud strategy.
- Identified and led creation of Work At Home employee Security Platform that exceeds on-prem call center employee monitoring which includes Bio Facial recognition, AI for camera, multi people, notes detection and locked down env for HIPAA and PCI
- Established SaaS Enterprise Customer Services Agent tools platform offering with scalability to serve multiple large enterprises.
- Driving digital transformation to monetize our data as subscription service targeting vendors, manufacturers, and retailers and shifting organization mindset to be data and knowledge services focused.
- Led transformation strategy, roadmap, and product solution delivery model that resulted in a fivefold increase in grow the business new product delivery vs first half of year keep the lights on initiatives.
- Acting as chief security officer, as well as CTO, with responsibilities including achieving CCPA compliance, maintaining, HIPAA, PCI compliance, web penetration testing, vulnerability assessment, and updating policies and processes including data privacy.
- Spearheaded D2C website for our tech support service offering showcasing our integrated live agent and self-support.
- Innovated e-commerce engine streamlined workflow and improved customer experience utilizing Robotic Process Automation (RPA).

**Confidential**

**Head of Technology (reporting to CEO)**

**2015 - 2019**

Transformed the organization by launching new products, spearheading innovation, accelerating and improving quality of technical solutions, migration to new publishing platform, integration of data creating new assets, and modernized systems leveraging micro services / API gateway. Collaborative leader with direct contributions to technical solutions in addition to providing vision and strategy communicated across the organization as well with Board Members.

- Management of Development teams, Technical & Data Architects, PMO, Infrastructure, Operations, and QA.
- Accelerated delivery by over 15% and reduced technical debt by 20% by establishing new PMO office, delivery framework, and processes as well as culture shift and training with business stakeholders.
- Led Transformation and adoption of Agile Methodology with a Maturity Model
- Ignited innovation as this organization's first foray with large Universities for new research product development leveraging Artificial Intelligence and Machine Learning as well as Block chain Smart Contracts prototype.
- Reduced weeks to days by implementing Rapid Prototyping processes and resourcing to deliver new Business Innovation Products
- Over \$3 million in cost savings by establishing new processes, architecture, & capabilities resulting in cost savings & efficiencies:
- \$1M in new sales revenue growth attributed to new ERP / CRM Salesforce capabilities and productivity efficiencies.
- Transformed Help Desk structure, request process management, tracking, and handling resulting in 30% request handling ability and 20% user satisfaction increase.
- Received Above and Beyond Award for solution and delivery of new Sales optimization resulting in 50% efficiency gains.
- Led implementation of Data Privacy and Security Program that achieved GDPR compliance.

## **Confidential NYSE Listed / Enterprise Solutions**

### **Global Managing Director - Development Tools, Enablement, & Methodology Practice**

**2003 - 2015**

- Lauded for agile initiatives leading to millions of dollars in cost savings, project acceleration, and risk reduction.
- Leader of Program / Project Management Office and Service Delivery Framework (SDF) methodology for all delivery and managed services including X Health Information Management System which was sold to X Healthcare
- Standard Tools and Suppliers project and processes resulting in over \$12 million in cost savings in one year and over \$40 million allocation shift to Standard Tools in year 4.
- Cloud Virtualization implementation resulting in over \$3M in cost savings year one and over \$12 million in 3 years.
- Enablement and support for Cloud Solution and Advisory Service Offerings, covering multiple vendors, including methods, proposal materials, reusable assets, and cloud infrastructure. Single Pane of Glass for orchestration of Lifecycle Management.
- Cross Business Unit Cloud for Development and Test as well as Solution Development Methodology Team
- Blueprint Experiential Workshops for HSBC, Citigroup (Check21), Huntington Bank (Check21), Lloyds Bank, Sprint/Nextel, AT&T, SBC, and News Limited
- Subject Matter Expert, host and key contributor for 90+ Thought Leadership web casts.
- Assisted in the development of vendor Business Plans, Reseller Agreements, Rules of Engagement, and Training Programs with key vendors such as IBM Rational, Microsoft, OpenText ProVision, and InteGreat.
- Practice Leader establishing new global Business Blueprint Group for Communications/Media in 2003.
- Engagement Manager: Sold Molina Healthcare, AT&T Enterprise Architecture Roadmap Blueprint.

## **Pricewaterhouse Coopers Consulting: (IBM Business Consulting Services after acquisition in 2002)**

### **Financial Services Web Architecture Integration Group Principal Consultant**

**2000 - 2003**

- As Practice Leader, established new Web Architecture Integration Group for Healthcare & Financial Services
- As Leader, manager, and architect:
  - Closed \$5M engagement for Merrill Lynch Wealth Management platform.
  - Sold and implemented \$3 Million Hartford Life Medical Underwriting Internet system.
  - Created financial services solution set and HIPAA solutions including for Blue Cross Blue Shield MA
  - Received high recognition for Thought Leadership and expertise for EAI/Middleware
- Global Relationship Manager for Sun; focused on BEA, Iona and Virtual Private Networking areas.
- Engagement Manager handling top tier client accounts such as Lucent, Sony Electronics, AXA Financial, MSDW, MBNA, Merrill Lynch, and Prudential Securities.

## **IBM Global Services**

### **Banking Finance Securities and Insurance Senior Consultant**

**1997 - 2000**

- Managed global team of resources, providing architecture, development, integration, and support for Merrill Lynch Middleware. Established middleware firm-wide standards.
- Presented / developed middleware solution that helped enable integration of Discover Brokerage front-end Internet trading applications with Morgan Stanley Dean Witter back-end trading systems.

## **Prudential Securities**

### **Project Manager New Technology Equity Area**

**1993 - 1997**

- Instrumental in planning, development, and implementation of new client/server trading environment, for Equity systems.
- Designed and implemented a single-entry system to report broker interests to Autex, Bridge, and in-house Block traders. This system increased the firm's reporting of trades to Autex resulting in a higher firm rating.
- Project Team Leader: Designed and programmed in-house Financial Information Exchange (FIX) messaging system.

## **Syracuse University – School of Information Studies, GPA 4.0**

Master of Science in Information Management

- Phi Kappa Phi Honor Society

## **Syracuse University – School of Information Studies**

BS in Information Management Minor: Business Management

### **Published Works**

- "X", Web Services Journal
- "X" by Columbia University
- Multiple articles and podcast interviews available on LinkedIn

### **Public Speaking**

- CTO Roundtables
- Gartner CIO Symposium
- Palladium CTO Forum – Key presenter on Application Modernization Topic and Security multi layers of protection
- IBM: Key Presenter regarding EAI and Portals at the Financial Services CIO Boston forum.
- NFAIS Publishing Conference - AIPP
- 3D Blueprinting Enterprise at IBM Rational User Conference, Unisys Corporation
- Presented at Seminars such as the Sun Internet Services Deployment Platform
- Technology Management topics, Syracuse University