**TECHNOLOGY LEADER**

**Exemplary record leading IT Operations, Team Building, Strategic Planning, and Project Management**

I am an accomplished IT Innovator with a consistent track record of successfully leading and driving operational improvement across a wide array of business and financial platforms. I am adept in ***Banking Applications, Information Security, Risk Management, Infrastructure, Data Analytics, Project Management, Process Re-Engineering,* C*ompliance, and Business solutions****.* As a strategic leader with a background of on-time, on-budget delivery of complex projects, I have successfully led building of corporate infrastructures and established operating controls that facilitated smooth operations during periods of significant change and growth.

***Competencies include:***

|  |  |
| --- | --- |
| * Business and Financial Solutions / IT Support | * IT Project Management / PMP certification |
| * Process Re-Engineering and Automation | * Go-To-Market / Sales and Marketing Strategies |
| * Benchmarking and KPIs / Scorecards / SLA’s | * Policy and Procedure Analysis / Development |
| * Budgeting, Forecasting, and Cost Controls | * Change Management / Risk, Audit, and Compliance |
| * Contract Negotiations / Vendor Management | * Strong Communication / Coaching and Team Building |

**PROFESSIONAL EXPERIENCE**

***Virtual CIO*** 06/24/2019 – Present

**Reliable IT,** Houston, TX

Reliable IT is a SOC 2 Managed Services Provider of IT, Consulting, Security, and Compliance for Banks & Credit Unions nationwide.

As a Virtual CIO (CIO-As-A-Service), I am an adviser to our clients’ Executive Management teams to enable them to focus on managing their institutions by providing strategic approaches that reduce risk and aligns IT with their business objectives.

**Achievement Highlights:**

* **Provided industry insights** on The Innovative Banker panel at the California Community Banking Network (CCBN) 2019 annual conference
* **Co-presented** at Fiserv Premier’s 2019 annual Western States User Group (WSUG) meeting. Our topic was *How a Virtual CIO can help avoid these 6 IT Mistakes*
* **Project Managed the implementation of MS Teams** at a rapidly growing 100% cloud-based customer
* **Rejuvenated** the company’s **Information Systems Policies and Procedures**

***Financial Technology Solutions Director*** 07/22/2013 – 01/31/2019

**CenturyLink,** Houston, TX

CenturyLink Enterprise for Business is a leader in managed computing and network infrastructure providing data, cloud, security, and voice offerings for enterprise-level clients.

Developed and deployed customized solutions leveraging core services from CenturyLink and partner portfolios. Formulated effective business strategies and supported sales teams with collateral and subject matter expertise. Collaborated extensively with customers and internal stakeholders to ensure seamless operations and execution of corporate objectives.

**Achievement Highlights:**

* **Enlarged funnel activity 20%** in top financial institutions by developing and implementing marketing campaigns including the *Under-Penetrated Accounts Engagement* program
* **Increased existing customer spend by 10% after establishing and cultivating key partnership alliances with joint Go-To-Market plans to complement firm’s delivery capabilities**
* **Increased market awareness by formulating themes for financial industry conferences** corresponding to various meetings’ hot topics
* **Arranged experts for panels, coordinate staffing, and oversee** follow-up campaigns
* **Enhanced sales teams’ experience and expertise that led to several $1m+ monthly contracts**
* **Business Analyst** providing gap studies and remediation planning

***Practice Director*** 07/21/2011 – 07/15/2013

**NIIT Technologies,** Atlanta, GA

NIIT Technologies is a top 20 IT Outsourcing and Services company that offers unique solutions predominantly for the Banking and Financial Services sectors

*Led the Retail Banking Services Practice* to provide custom, cost-effective, and reliable software solutions for banks and credit unions in the US. Initiated and advanced new service offerings, marketing materials, and sales presentation. Formed strategic partnerships to supplement successful delivery capabilities across business platforms.

**Achievement Highlights:**

* **Business Analyst/Project Manager** for both on-shore and off-shore engagements
* **Originated the Go-To-Market strategies** for the US financial vertical markets creating marketing materials and sales collateral which included new services i.e. Enterprise Risk Management, Fraud Mitigation, AML, and Process Automation
* **Reduced annual license fees $5M Year-Over-Year (YOY) for a top 75 US bank after authorizing a “*Core and Related Systems Viability*” study and renegotiating contracts**
* **Generated over $5M revenue annually** while I managed the full life cycles of projects for both on and offshore initiatives that enabled a bank to sustain a legacy core system
* **Generated 15% annual increases** across sales projects and initiatives
* **Created Centers of Excellence** for both on-shore and off-shore Cobol **Core System Programming, Fraud Mitigation, Master Data Management, Data Analytics**, and general **IT Staff Augmentation**

***Chief Technology Officer*** 07/12/2010 – 07/15/2011

**Grand Bank of Texas,** Grand Prairie, TX

As member of the senior management team, set policies, procedures, protocols, and goals to conform to the overall technology strategy and budgets for the information systems and data processing departments.

**Achievement Highlights:**

* **Slashed bank’s annual IT expense 50% by managing conversion** of a legacy outsourced core system to an in-house solution
* **Enabled expansion of the bank by architecting a new secure, state-of-the-art server room and seamlessly migrated** all data processing functions
* **Gained regulatory compliance by revising risk, operating procedures, and IT-related policies**

***Product Manager*** 08/10/2009 – 06/25/2010

**New Core Banking Systems,** Birmingham, AL

New Core Banking Systems developed and marketed the “Single Source” core processing suite for community financial institutions.

Managed the entire SDLC, which included the conception, design, development, testing, documentation, marketing, and implementation of Core and ancillary software solutions for the banking industry.

**Achievement Highlights:**

* **Designed and executed workflows and reporting capabilities** of the company’s solution suite
* **Led focus group heavily relied upon for feature / functionality** of new products and enhancements
* **Created the IT, Software Development, Change Management, and Software Escrow** SOPs
* **Established the patent process for all unique solutions and IP,** both product and process-related
* **Ensured compliance with government oversight agencies to develop appropriate internal controls** and audit policies

***Chief Technology Officer*** 01/14/2002 – 08/04/2009

**Prosperity Bank,** Houston, TX

Prosperity Bank is a Texas-based regional financial institution with over $30 billion in assets and is a top 100 US bank.

Led the IT department by selecting, implementing, and directing all aspects of their technology solutions and infrastructure. Managed a professional IT staff responsible for all processing and information delivery. Analyzed needs, assessed position, and developed long-range technology strategy and road-maps. Devised and deployed SOPs. As a member of the Senior Operations Committee, I helped set policies and procedures for all operational areas of the bank.

**Achievement Highlights:**

* **Significantly reduced bank’s technology-related expenses 65% annually saving over $30M i**n a 7-year period
* **Instituted system and process modernizations** enabling bank to attain efficiency ratios **under 45%**
* **Led team of C-level executives and stakeholders to define RFPs** for a new core solution and ancillary systems. **Evaluated, negotiated, selected, and managed all aspects of the multi-faceted conversion projects** fully integrating 7 separate solutions
* **Solutions selected and implemented enabled the institution to grow from $1B in assets with 27 locations to $20B in assets** with more than 200 locations
* **Managed complete project life cycles to convert / merge all network, core, and ancillary systems for 20+ acquisitions**
* **Directed sustained growth of a single rack network to a best in class redundant, VMware and Citrix-based server farm** comprised of 500 servers, an MPLS WAN, and Core System servers
* **Ensured smooth business continuity by designing and building-out a fully redundant and real-time DR facility**
* **Provided in-depth analyses and insights** for executive team **by developed hundreds of automated reports**
* **Bank met 100% of regulatory, SOX, and compliance-related initiatives,** **established and enforced all IT-related SOX controls, and** oversaw audits and mitigations of concerns

***Chief Technology Officer*** 08/10/2000 – 01/11/2002

**City National Bank,** Mineral Wells, TX

Managed Information Systems and Operations teams to ensure high-quality encoding and posting of transactions, precise account processing, and timely dissemination of management information.

***Operations and Technology Officer*** 01/04/1999 – 07/14/2000

**Founders Trust National Bank,** Sioux Falls, SD

Supervised, trained, set work plans, and conducted performance and compensation reviews for personnel. Leveraged astute strategy and roadmap planning to **place bank in a position to continue growth projections of 20% per year.**

***Senior Programmer & Business Analyst*** 07/06/1987 – 12/31/1999

**Fiserv,** Sioux Falls, SD

Advanced all areas of the Precision Software Suite with an emphasis on 3rd party product integrations. Served as Subject Matter Expert (SME) **leveraging 12 years of experience with the firm as a Programmer Analyst, Business Analyst, System Administrator, and Software Services Representative**.

**Achievement Highlights:**

* Pioneered initial research, design, and Q/A on the company’s flagship product, *Precision*. *Precision* has since garnered **90% of their customer base and 15% of banks** in the country
* Researched, designed, programmed, and tested Core system features including DDA/Savings statements, overdraft checking, ATM/Debit Card usage and terminal fees, dealer floor plans, variable rate loans, fee amortization, loan participations bought/sold, non-accrual & written off loans, and tickler system
* Involved in all phases of the integration of all complimentary systems; such as, ATM networks, ACH, check imaging, internet banking, mobile banking, platform accounting, and voice response
* **Provided Sales Enablement as a technical resource** offering prospects an explanation of existing features in non-sales terminology and clearly defining contractual program enhancements
* **Authored hundreds of shell scripts** to enable users and support staff to efficiently and intuitively administer UNIX/AIX systems

**EDUCATION, CERTIFICATIONS, and ASSOCIATIONS**

**Bachelor of Business Administration (BBA),** Northern State University, Aberdeen, SD

**Project Management Professional (PMP) Certification**

**Member,** Project Management Institute (PMI)

**Member,** Association for Financial Technology (AFT)