

STEVEN EZRATTY

FAIR LAWN, NJ 07410

(201) 410-8397 | STEVEEZRATTY@GMAIL.COM
<https://www.linkedin.com/in/stevenezratty/>

Accomplished senior level executive with extensive management experience in application development, configuration, and implementation of software solutions developed both internally and by third party vendors. Proven ability to align technology with business goals and provide exceptional results. Effectively demonstrate the benefits of new technologies and system innovations. Strong vendor relationships and negotiation skills as well as outstanding leadership, communication abilities and business acumen.

AREAS OF EXPERTISE

Strategic Planning & Development | Innovation | Executive Level Presentations | Contract Negotiations | Project Management | Mentoring | Public Speaking | Custom Development Projects | Installations & Migrations | Process Design | Team Training | Salesforce Sales & Service Clouds | Service Now | CoreMedia CMS | IBM Web Content Management | WordPress | Alteryx | Robotic Process Automation (RPA) | JIRA | Confluence | Business Process Management

EXPERIENCE

Commonwealth Financial Network (August 2022-Present)

Senior Director of Engineering & Automation

Responsible for the Salesforce Development, Administration, Robotic Process Automation Teams and design of new business processes

- Hired and Managed Salesforce Team comprised of local, onshore, and offshore resources.
- Led data migration and process conversion from previous Salesforce configuration to all new Salesforce configuration including API Mapping, Data Cleaning, and Testing procedures
- Decreased operating expenses by over two million dollars in the first year by renegotiating contracts & eliminating wasteful spend.
- Executed many proofs of concept for business and management to demonstrate “the art of the possible”. Demonstrations included Predictive Analysis, Knowledgebase, Interactive Bots, and Agentforce agents.
- Evaluation, installation, and configuration of OWN Backup, AutoRABIT CICD Tool, Fintrx, and GeoPointe geo-positioning software
- Led large data clean-up effort with Data Governance to assist business in obtaining accurate lead and reporting information.
- Reduced data quality issues by 15% by implementing guardrails to ensure intake of clean and complete data only.
- Responsible for staff selection, reviewing development alternatives, software purchases and enterprise development decisioning.
- Led troubleshooting and data integration team
- Architected multiple solutions to solve business needs which included inter-team coordination.
- Designed and implemented intake, development and management reporting processes.
- Designed and implemented best practices of development and deployment, oversee deployment process.
- Deliver high quality results to the business through collaboration with the business and various areas of the IT organization, consultants and third-party vendors resulting in effective designs, implementations and solutions.
- Conduct goal and review sessions as well as providing mentoring for staff growth.
- Introduced agile sprint sessions and custom JIRA dashboards for transparent reporting and tracking
- Led sprint and deployment planning sessions
- Developed ROI standards for RPA bots to ensure the value provided by each bot far exceeds the cost.
- Developed use case standards for Robotic Process Automation technology and several successful RPA implementations.

Citizens Bank, Iselin NJ (Formerly Investors Bank Due to Acquisition) (April 2022 – May 2023)

Senior Vice President (Platform Director - Commercial Banking Systems)

Oversaw solution design effort for the Know Your Customer (KYC) on-boarding platform (Fenergo) to streamline the KYC Process for new and existing commercial clients, improve the client experience, and improve process usability by reducing manual work effort

- Oversaw Fenergo, MuleSoft, and Salesforce environment installations.
- Executed approved business objectives and collaborated with business on three-year road map and strategy.
- Managed and coordinated project resources across multiple work groups
- Ensured accuracy of business requirements, solutions, acceptance criteria, and test scenarios
- Determined system data flows, structures, and processes linking disparate systems.
- Coordinated with Middleware Team to develop Experience, Process, and System APIs.
- Daily scrum reviews of user stories, issues, and epics in JIRA.
- Managed and coordinated project resources over cross functional work groups.
- Conducted regular business status meetings to discuss budget, status, issues, and progress.
- Managed external vendor relationships and negotiations.
- Oversaw gathering and documentation of product test case scenarios

Investors Bank, Iselin, NJ (Acquired by Citizens Bank) (May 2019 – April 2022)**Senior Vice President (Director of IT Application Development)**

Responsible for Salesforce Financial Cloud, Salesforce Service Cloud, Service Now, Nautilus (OnBase) Content Management System, MuleSoft API / ETL Services, Alteryx, Robotic Process Automation (RPA), and Quality Assurance teams.

- Provided technical leadership for application strategy, design, development, implementation, integration, and maintenance.
- Conducted monthly Steering Committee presentations featuring budget, new technology demonstrations, and project status
- Designed Salesforce 360 process to consolidate data from multiple sources into a single omnichannel experience
- Designed Integration between Nautilus (OnBase) Content Management System and Salesforce to store and retrieve customer data from a single user interface.
- Designed and supported several custom workflow processes including the Systems Change Management Process.
- Implemented Salesforce and Outlook Mail Integration.
- Supervised development of Service Now platform implementation, including Support Ticket Workflow, Application Development Request Workflow, Project Resource Request Workflow, and Customized Service Now Portal.
- Managed proof of concept development to integrate Salesforce & Fiserv Signature back-end database via APIs to allow for Salesforce real time data look-ups and updates.
- Managed project to allow nCino to push data into the Signature database via API in real-time.
- Implemented Marketo Marketing application
- Implementation of Adobe Analytics into the Web site.
- Customized Salesforce Mobile Application for Sales team to access data and create updates during COVID
- Rapid deployment of Q2 PPP application into Salesforce due to COVID.
- Implemented MuleSoft Any Point Platform with 35 APIs in the first year.
- Developed use case standards for Robotic Process Automation technology and several successful RPA implementations.

Brown Brothers Harriman Jersey City, NJ**Vice President - Manager of Global Digital Marketing Systems (2014 – 2019)**

Responsible for three marketing technology related departments with responsibilities including creation of corporate web site and infrastructure, Salesforce deployment, administration, and development, and Alteryx Environment.

Website & Marketing Systems

- Supervised Web Content Development and Infrastructure construction for Corporate Web Site. This included the migration and construction of Full and Micro Sites, Analytics, Blog Customization, Social Media Services, and Strategies.
- Implemented Sales Enablement Programs such as Qvidian, which allowed salespersons to respond to Requests for Proposals, and SAVO, which allowed for the storage and distribution of approved Marketing Materials
- Managed Analytics Reporting.

Salesforce

- Managed and coordinated all systems side Salesforce CRM launch activities and strategies.
- Worked as a Customer champion, product evangelist, and innovator.
- Managed a development staff of analysts, developers, and consultants across multiple locations.
- Developed CRM Strategy and Development with Lines of Business.
- Led CRM Data Consolidation, cleansing, and migration to Salesforce CRM.
- Co-designed security model with the business line and Data Security for the Salesforce instance.
- Coordinated effort that captured Salesforce messaging into Smarsh System to satisfy Compliance and Risk requirements.
- Led team customization activities, including requirements gathering, development, testing, and deployments.
- Collaborated on training content and delivery
- Introduced Salesforce calendar synchronization and data backup functionality into the environments.
- Defined and customized CRM mobile strategy with Business Lines and Systems teams
- Conducted regular meetings with middle and senior management to discuss road map, direction, enhancements and demonstrated potential new features and products.
- Proposed and implemented potential use cases to expand platform usage and increase ROI.
- Identified new Salesforce Innovations and demonstrated potential functionality to Business Lines.
- Implemented Salesforce Data Integration with external systems.

Alteryx

- Designed and deployed Alteryx ETL Environment for scheduling ETL processes, alerts, and deliveries.
- Created Alteryx Low Code Development Guidelines to allow business to create processes reducing reliance on IT resources
- Worked with Project Managers and Analysts to ensure project plans and reporting were accurately maintained.
- Managed system implementations in RD, QC, and Production Environments.
- Shepherded and expedited products and vendors through the on boarding process.

- Built and fostered trusted relationships based on transparency and results.
- Ensured successful platform integration and interoperability testing.
- Mentored newly on-boarded and more seasoned employees looking to further their careers.
- Focused on enabling business users to solve complex data issues in Alteryx
- Communicated and demonstrated features, capabilities, and benefits of the Alteryx platform.
- Responsible for management of development and administrative staffs
- Created and maintained development and product usage best practices
- Conducted enablement sessions for Alteryx Designer and Server products
- Jointly architected solutions, troubleshooting, and provided technical advice
- Advocated customer needs cross-departmentally.
- Identified opportunities to leverage technology tools (ETL, automation, visualization tools, etc.)

Brown Brothers Harriman Jersey City, NJ

Vice President and Manager, Business Process Technologies (2011 – 2014)

Created an international workflow department comprised of IBM BPM, Oracle UCM, IBM Blueworks Live, and Lotus Notes/Domino staff with the goal of automating manual procedures to reduce processing time and increase velocity of output.

- Utilized the strengths of each team and created a single cohesive team to generate Enterprise Workflow Applications.
- Considered SME of workflow & content management
- Implemented Business Process Design Development.
- Designed Infrastructure for IBM BPM 7.5 and 8.5.
- Redesigned Oracle UCM infrastructure to improve performance significantly.
- Employed team-building skills and techniques to international teams to unify team
- Generated product awareness at all levels of management.
- Project Leader for discovery sessions and workflow design.
- Staffed New Jersey, Boston, Poland, and India department members.
- Integrated new and legacy systems.
- Presenter in Las Vegas and Wall Street for Financial Audiences.
- Orchestrated Business Line & Systems Collaboration Sessions
- Created internal user groups to improve departmental communications and transparency.
- Created and maintained vendor relationships.
- Created support procedures, SLAs and categorized reporting that improved department issue response times
- Conducted performance appraisals, set goals, and coached staff constructively.
- Held weekly team meetings to promote a single team despite multiple locations.
- Promoted team environment with clients, striving for continuous improvement in process and communications.
- Implemented procedures to improve the quality of products and deployments which follow and expand on SDLC.
- Reported RAG Status and provided daily performance reports.

Brown Brothers Harriman Jersey City, NJ

Vice President, Content Management Strategist/Engineer (2009 – 2011)

Introduction of Web Content Management System into the Enterprise to reduce file and retrieval times while making documents accessible instantly across multiple locations.

- Performed Content Management System analysis and proof-of-concept development which resulted in department creation.
- Implemented multiple use cases and eventual roll out of CMS.
- Championed proof of concept for IBM Web Content Manager (WCM). This included design models, user models, workflow models, conceptual navigation, and detailed wireframes.
- Familiarized team with WCM Components such as Authoring Templates, Presentation Templates, Taxonomy, Categorization, Site and Site Areas, Menus, and Navigators.
- Managed requirements as technical project team leader from phase through design and proof of concept.
- Provided experienced leadership in eliciting business requirements.
- Created and implemented training courses to educate the systems development team.

EDUCATION, CERTIFICATIONS AND PROFESSIONAL DEVELOPMENT

Bachelor of Science (BS) in Business Management, Concentration in Computer Science - Fairleigh Dickinson University,

Salesforce Certified Administrator

Salesforce Certified AI Associate

Salesforce Certified Associate

nCino 101 Certification

Fenergo Standard Functionality: FEN-X Certification

JIRA Fundamentals Assessment

Confluence Fundamentals Assessment

IBM Certified BPM Analyst: Blue Works Live, Business Process Manager Express Standard Edition v7.5, 8.01

IBM Certified Application Developer: Workplace Content Manager

National Association of Photoshop Professionals

Toastmasters International: Competent Communicator Certification & Board Member

Multiyear Presenter at IBM Impact Las Vegas

Presenter at Wall Street IBM BPM Innovation Conference

