

# STEVEN EZRATTY

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Strategic and results driven with deep expertise in Salesforce CRM, Web Content Management, and Enterprise Process Automation. I specialize in transforming complex business challenges into scalable technology solutions, leading cross-functional teams, architecting robust platforms, and driving adoption across global organizations. I thrive at the intersection of innovation and execution whether it's launching new platforms, optimizing infrastructure, or presenting technical strategies. I foster collaborative environments that elevate team performance and deliver measurable impact.

## AREAS OF EXPERTISE

Strategic Planning | Development | Innovation | Installation & Migration | Process Design | Team Development | Mentoring | Public Speaking | Salesforce Sales & Service Clouds | Service Now | Content Management Systems | WordPress | Alteryx | Robotic Process Automation (RPA) | JIRA | Confluence | Business Process Management | Four Time Salesforce Certified | Two Time AWS Certified | Executive Level Presentations | Project Management | Contract Negotiations |

## EXPERIENCE

### **Commonwealth Financial Network (August 2023-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 Cleansing, and Testing procedures
- Created AI Retrieval Augmented Generation (RAG) Proof of Concept utilizing S3 storage for knowledge articles, OpenSearch Vector Database, Claude v2 Model and Titan Server to extend Model and enabling Agent to query company information
- Decreased operating expenses by over two million dollars in the first year by renegotiating contracts & eliminating wasteful spend.
- Created budget savings of approximately one million dollars by eliminating low ROI Robotic Process Agents.
- 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 Artificial Intelligence agents.
- Created Salesforce Artificial Intelligence Proof of Concept Agent to allow Salesforce users to query Salesforce and have agents generate reports and provide sales persons with summary of client cases, opportunities and contact listing prior to client visits.
- Evaluation, installation, and configuration of OWN Backup, AutoRABIT CICD Tool, and GeoPointe geo-positioning software
- Led large data clean-up effort (over 300,000 records) with Data Governance to obtain 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 several multi-team solutions to solve business data needs
- Designed and implemented intake, development and management reporting processes.
- Designed and implemented best practices for application 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.

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

**Senior Vice President (Platform Director - Commercial Banking Systems) – Continued**

- Conducted 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 and Service Clouds, 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 integrate data from multiple sources into a single omnichannel experience
- Designed Integration between Nautilus (OnBase) Content Management System and Salesforce to retrieve data on a single user interface.
- Designed and supported several custom process flows including the Systems Change Management Process.
- Implemented Salesforce and Outlook Mail Integration.
- Supervised customization & implementation of Service Now including Support Ticket, Development Request, & Project Resource Request Process Flows. Created customized Service Now Portal.
- Managed proof of concept to integrate Salesforce & Fiserv Signature back-end database via APIs to allow for Salesforce real time data look-ups and updates.
- Implemented Marketo Marketing application & Adobe Analytics.
- 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.
- Customer champion, product evangelist, and innovator.
- Managed staff of analysts, developers, administrators, and consultants across multiple locations.
- Developed CRM Strategy in conjunction with Lines of Business.
- Led CRM Data Consolidation, cleansing, integration, 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 Riva 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 management to discuss road map, direction, enhancements and demonstrated potential new features and products.
- Proposed and implemented potential use cases (Art of the Possible) to expand platform usage and increase ROI.

### Alteryx

- Responsible for management of development and administrative staffs
- Identified opportunities to leverage technology tools (ETL, automation, visualization tools, etc.)
- Designed and deployed Alteryx ETL Environment for scheduling ETL processes, alerts, and deliveries.
- Created and maintained development and product usage best practices
- Conducted enablement sessions for Alteryx Designer and Server products
- Advocated customer needs cross-departmentally.
- 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.
- Enabled and instructed business users to solve complex data issues in Alteryx
- Communicated and demonstrated features, capabilities, and benefits of the Alteryx platform.

### **Brown Brothers Harriman Jersey City, NJ**

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

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

- Utilized the strengths of each team member to create a single cohesive team to generate Enterprise Process Flows.
- Considered SME for workflow & content management
- Implemented Business Process Design Development.
- Designed & Implemented Infrastructure for IBM BPM 7.5 and 8.5.
- Redesigned Oracle UCM infrastructure to improve performance significantly.
- Employed team-building skills and techniques across international staff 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 design through proof of concept.
- Provided experienced leadership in eliciting business requirements.
- Created and implemented training courses to educate systems development team.

## EDUCATION, CERTIFICATIONS AND PROFESSIONAL DEVELOPMENT

Fairleigh Dickinson University

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

- Salesforce Certified Administrator
- Salesforce Certified AI Associate
- Salesforce Certified Business Analyst
- Salesforce Certified Platform Foundations
- AWS Certified Cloud Practitioner
- AWS Certified Artificial Intelligence Practitioner
- 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
- IBM Certified Application Developer: Workplace Content Manager
- Multiyear Presenter at IBM Impact Las Vegas
- Presenter at Wall Street IBM BPM Innovation Conference

