

STEVEN EZRATTY

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Strategic and execution-focused technology leader with deep expertise in Salesforce CRM, enterprise automation, content management, and platform engineering. Proven track record modernizing legacy environments, leading global teams, architecting scalable platforms, and delivering multi-million-dollar efficiency gains. Adept at aligning technology strategy with business objectives, driving cross-functional delivery, and elevating organizational performance through innovation, governance, and operational excellence.

CORE LEADERSHIP STRENGTHS

Platform Strategy & Architecture • Enterprise CRM Leadership • Salesforce Sales & Service Clouds • Automation & RPA Strategy • Data Integration & API Architecture • Cloud & AI Enablement • Agile Delivery Leadership • Global Team Management • Vendor & Contract Negotiation • Executive Stakeholder Engagement • Governance & Compliance • Digital Experience & CMS Platforms • Four Time Salesforce Certified • Two Time AWS Certified

EXPERIENCE

Commonwealth Financial Network (August 2023-Present)

Senior Director of Engineering & Automation

Lead enterprise Salesforce development, administration, and RPA teams while driving platform modernization, AI innovation, and operational efficiency

- Directed full **Salesforce re-architecture and data migration**, including API mapping, cleansing, and testing.
- Built a **AI RAG proof of concept** using S3, OpenSearch vector DB, Claude v2, and Titan Server to enable intelligent knowledge retrieval and agent-driven automation.
- Delivered multiple **AI and Agentforce demonstrations** showcasing predictive analytics, knowledge automation, and conversational bots.
- 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.
- Reduced operating expenses by **\$2M+ in year one** through contract renegotiation and elimination of redundant spend.
- Generated **\$1M in savings** by retiring low-ROI RPA bots and reallocating investment to high-value automation.
- Led a **300K-record data cleanup initiative**, improving data quality by 15% through intake guardrails and governance.
- Implemented OWN Backup, AutoRABIT CI/CD, and GeoPointe to strengthen reliability, deployment velocity, and platform capabilities.
- Introduced Agile sprint ceremonies and custom JIRA dashboards to improve transparency and delivery predictability.
- Designed and implemented intake, development and management reporting processes.
- Managed global teams across onshore, offshore, and nearshore locations; responsible for hiring, mentoring, and performance management.

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

- Directed solution design for the **Fenergo KYC on-boarding platform**, improving client experience and reducing manual effort.
- Managed Salesforce, MuleSoft, and Fenergo installations and integrations across the commercial banking ecosystem.
- Co-developed a **three-year technology road-map** aligned with business strategy and regulatory requirements.
- Led cross-functional Agile teams, daily scrums, and JIRA-based delivery management.
- Coordinated API development with middle-ware teams, defining Experience, Process, and System APIs.
- Managed vendor relationships, contract negotiations, and multi-team resource planning.

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.

- Directed **Salesforce 360 architecture**, integrating data from multiple systems into a unified experience.
- Implemented **Salesforce - OnBase integration**, enabling real-time content retrieval in a single UI.
- Launched **35 MuleSoft APIs** in year one to accelerate enterprise integration.
- Customized Salesforce Mobile App and deployed rapid COVID-response solutions including PPP application workflows.

- Implemented Marketo and Adobe Analytics to modernize marketing automation.
- Led ServiceNow customization and portal development for support, development, and project intake workflows.
- Delivered multiple RPA implementations and established enterprise use-case and ROI standards.
- Provided technical leadership for application strategy, design, development, implementation, integration, and maintenance.
- Conducted monthly Steering Committee presentations including budget, new technology demonstrations, and project status
- Designed and supported several custom process flows including the Systems Change Management Process.
- Implemented Salesforce and Outlook Mail Integration.
- 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.

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/ETL Environment.

Website & Marketing Systems

- Architected CMS infrastructure with redundancy, fail-over, and load balancing to improve up-time and performance.
- Oversaw corporate website development, migrations, and digital experience enhancements. This included the migration and construction of Full and Micro Sites, Analytics, Blog Customization, Social Media Services, and Strategies.
- Deployed sales enablement platforms (Qvidian, SAVO) and managed analytics reporting.

Salesforce

- Directed enterprise Salesforce launch, including data consolidation, migration, security, model design, and governance.
- 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.
- Coordinated effort that captured Salesforce messaging into Smarsh System to satisfy Compliance and Risk requirements.
- Led team SDLC activities
- 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, enhancements and demonstrated new features and products.
- Championed “Art of the Possible” use cases to expand Salesforce adoption and ROI.

Alteryx

- Designed and deployed enterprise Alteryx ETL environment and governance framework.
- Responsible for development and administrative staffs
- Identified opportunities to leverage technology tools (ETL, automation, visualization tools, etc.)
- Created and maintained development and product usage best practices
- Ensured successful platform integration and interoperability testing.

Brown Brothers Harriman Jersey City, NJ

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

Created an international process flow 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.

- Designed & Implemented Infrastructure for IBM BPM 7.5 and 8.5.
- Redesigned Oracle UCM infrastructure to **improve performance by 50%**.
- Designed enterprise workflow automation solutions and improved SDLC discipline.
- Presented at IBM Impact Las Vegas and Wall Street BPM Innovation Conferences.
- Considered SME for workflow & content management
- Integrated new and legacy systems.
- Created support procedures & SLAs improving departmental issue response times
- Conducted performance appraisals, set goals, and staff coaching.

Brown Brothers Harriman Jersey City, NJ

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

Introduced enterprise Web Content Management, led proof-of-concept, design models, workflows, and taxonomy.

- 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 wire-frames.
- Familiarized team with WCM Components such as Authoring Templates, Presentation Templates, Taxonomy, Categorization, Site and Site Areas, Menus, and Navigators.
- Delivered training, governance, and platform adoption programs

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
- JIRA Fundamentals Assessment
- Confluence Fundamentals Assessment
- Fenergo Standard Functionality: FEN-X Certification
- 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

