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ENTERPRISE TECHNOLOGY EXECUTIVE • SALESFORCE & AUTOMATION PLATFORMS • FINANCIAL SERVICES

Enterprise technology executive with 15+ years leading large-scale platform transformation, automation strategy, and early AI-enabled initiatives across financial services and global enterprises. Proven track record of partnering with C-suite and business leadership to align technology investment with strategic priorities delivering measurable outcomes including cost reduction and operational efficiency. Known for building and leading high performing global engineering organizations, modernizing legacy platforms, and translating complex technical roadmaps into board-level narratives.

CAREER HIGHLIGHTS

\$3M+ in cost savings via strategic vendor renegotiation and automation ROI optimization

SVP level: Oversaw enterprise platforms spanning Salesforce, MuleSoft, RPA, and KYC systems, Introduced early AI capabilities through targeted pilots and POCs.

Early AI Adoption Leadership: Delivered the firm's first practical AI use cases, including a RAG proof-of-concept, Agentforce pilots, and a predictive analytics prototype to help the business validate what was feasible.

Multi-institution: Led major transformation programs across banking, asset management, and fintech environments.

CORE LEADERSHIP STRENGTHS

Enterprise Technology Strategy	Salesforce Sales, Service & AI	Automation & RPA	AI/ML & Agentic Workflows
Platform Engineering	MuleSoft & API Strategy	Cloud Enablement (AWS)	KYC/Compliance Systems
Global Team Leadership	Budget Ownership	C-Suite & Board Engagement	Vendor & Contract Strategy
Digital Transformation	Agile Delivery at Scale	Governance & SDLC	Executive Stakeholder Alignment

PROFESSIONAL EXPERIENCE

Commonwealth Financial Network | Senior Director, Engineering & Automation

August 2023 – Present

Recruited directly by a former CIO to stabilize and modernize the enterprise Salesforce, RPA, and automation engineering organization at one of the nation's leading independent broker-dealers.

Scope: Led Salesforce administration and engineering, automation/RPA development, and the firm's early AI exploration work, including Agentforce pilots and small agent-driven workflow prototypes. Partnered with Platform Owners who managed business analysts, requirements, and prioritization enabling the engineering organization to focus on delivery excellence, technical quality, and forward looking innovation. Managed onshore and offshore teams across a complex, multi-platform environment.

Strategic Impact & Key Achievements

- Delivered **\$2M+** in cost savings through strategic vendor contract renegotiation and elimination of redundant platform spend, presenting business case directly to senior leadership.

- Restructured the RPA portfolio by retiring low ROI automation and reallocating investment to high value use cases, generating an additional **\$1M** in operational savings.
- Built an enterprise RAG proof-of-concept (S3 + OpenSearch + Claude + Lex) to explore knowledge retrieval and agent-driven workflows and help the business understand what was feasible.
- Built a Salesforce AI agent that allowed business users to self-serve CRM insights, reducing analyst dependency and speeding up decision cycles.
- Served on the enterprise AI Governance Committee, defining guardrails, risk controls, strategy, and standardized testing procedures to ensure safe, compliant, and high-quality AI adoption across the organization.
- Created a predictive scoring prototype that highlighted high-probability opportunities and sharpened sales team focus.
- Led a **300K-record** data quality cleanup, improving CRM data integrity by 15% through automated governance and intake controls..
- Modernized DevOps infrastructure with OWN Backup, AutoRABIT CI/CD, and Git reducing deployment risk and increasing release velocity.
- Introduced Agile delivery ceremonies and JIRA governance dashboards, establishing measurable delivery transparency across engineering teams.

Citizens Bank (formerly Investors Bank) | Senior Vice President, Platform Director - Commercial Banking Systems

April 2022 – May 2023

Retained to lead platform strategy and solution architecture for the commercial banking technology ecosystem following Citizens Bank's acquisition of Investors Bank. Role concluded with the elimination of the technology organization post conversion.

Scope: Enterprise ownership of Salesforce CRM, MuleSoft integration layer, and Fenengo KYC onboarding platform. Led cross functional Agile teams and drove vendor strategy, roadmap development, and regulatory aligned delivery.

Strategic Impact & Key Achievements

- Directed a full redesign of the **Fenengo KYC** client onboarding workflow, reducing manual processing time from hours to minutes dramatically improving commercial client experience and compliance efficiency.
- Co-authored a **three-year enterprise technology roadmap** aligning Salesforce, MuleSoft, and KYC platforms with business growth strategy and regulatory requirements - presented to executive leadership.
- Directed API development across experience, process, and system layers to enable real-time data flow across commercial banking platforms..
- Managed multi-vendor relationships, contract negotiations, and cross-team resource planning across a complex, post-acquisition technology environment.

Investors Bank | Senior Vice President, Director of IT Application Development

May 2019 – April 2022

Led enterprise application portfolio strategy across Salesforce, ServiceNow, OnBase, MuleSoft, Alteryx, RPA, and QA managing cross-functional teams and reporting directly to C-suite on budget and technology direction.

Strategic Impact & Key Achievements

- Architected **Salesforce 360**, a unified CRM data platform integrating feeds from multiple source systems, providing a single client view across the enterprise.
- Delivered **35 MuleSoft APIs** in the first year, significantly increasing integration velocity and supporting new business capabilities.
- Presented monthly to the **Steering Committee** on technology strategy, platform innovation, and budget performance maintaining executive alignment through periods of rapid organizational change.
- Deployed rapid COVID-response technology solutions including PPP workflows and mobile client enhancements within weeks of mandate, demonstrating operational agility under pressure.
- Modernized marketing technology stack with Marketo and Adobe Analytics, enabling data driven campaign execution.

- Established enterprise RPA governance standards and delivered multiple automation use cases across operations.

Brown Brothers Harriman | Vice President - Progressive Leadership Across Three Roles

2009 – 2019

Sustained progression across three roles with increasing scope and organizational authority *from founding the enterprise content management practice to leading three global technology teams across CMS, Salesforce, and Alteryx ETL platforms.*

VP, Global Digital Marketing Systems (2014 – 2019)

- Led three global engineering teams owning CMS, Salesforce CRM, and Alteryx ETL platforms supporting enterprise-wide data and digital operations.
- Architected a redundant, high-availability CMS infrastructure, improving platform uptime and supporting global web presence.
- Led the enterprise Salesforce rollout, data consolidation, governance, security and drove adoption through hands-on use-case demonstrations.
- Designed and deployed the enterprise Alteryx ETL environment and governance framework to support firm-wide analytics.

VP, Business Process Technologies (2011 – 2014)

- Founded and led an international workflow automation department specializing in IBM BPM and Oracle UCM building the practice from the ground up.
- Improved Oracle UCM performance by **75%** through infrastructure redesign.
- Selected as speaker at IBM Impact Las Vegas and the Wall Street BPM Innovation Conference recognized externally as a subject matter authority.

VP, Content Management Strategist/Engineer (2009 – 2011)

- Introduced enterprise Web Content Management to BBH leading proof-of-concept, platform design, rollout, and department formation.

EDUCATION, CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

Education	Fairleigh Dickinson University Bachelor of Science in Business Management, Concentration in Computer Science
Salesforce	Certified Administrator • Certified AI Associate Certified Business Analyst • Certified Platform Foundations
AWS	AWS Certified Cloud Practitioner AWS Certified Artificial Intelligence Practitioner
Additional	JIRA Fundamentals • Confluence Fundamentals • Fenergo FEN-X IBM Certified BPM Analyst • IBM Certified Application Developer
Recognition	Multiyear Presenter: IBM Impact Las Vegas Presenter: Wall Street IBM BPM Innovation Conference