

OPERATIONS & PRODUCT DEVELOPMENT LEADER

High performance leader with significant senior leadership experience in digital product management, development, delivery, operations, and support. Skilled manager with expertise leading teams through strategic, leadership, and regulatory changes. Delivery focused executive and consensus builder able to balance competing interests to deliver strategic project success and consistent operational performance.

Known for building and managing mission critical systems, processes, and organizations and driving successful product launches and client onboarding. Recognized for superior client service; building organizational delivery capabilities; managing product development life cycles and leading the operations of technical organizations.

Change & Efficiency Management | Business Planning | Continuous Improvement | Agile Methodologies
Product & Process Transformation | Operations Management | Product Management | Cross-functional Leadership | Budgeting
Revenue Generation & Cost Reduction Strategies | Executive Management | Professional Services | Software Client Service

PROFESSIONAL EXPERIENCE

TRANSDEV NORTH AMERICA, PASADENA, CA VICE PRESIDENT, B2B AND B2G PRODUCTS

MAR 2018 – DEC 2019

Promoted from UDI subsidiary leadership role to Head of Technology Product Development for in-house product development teams for Transdev in North America. Transdev is the largest global private provider of multiple modes of transport in North America, operating in 200 cities with 20,000 employees.

- Led agile product management, engineering, QA and Testing teams responsible for design, development and delivery of mobility-focused software products in North America and collaborative initiatives with Transdev teams in Europe for mobile passenger app and additional software including QA and testing for an autonomous vehicle program.
- Guided the successful delivery of products including mobile transit rider and driver applications, web-based dispatch management tools and back-end support tools and third-party APIs.
- Selected as a Top 25 international manager (out of >500) by Senior management to participate in Transdev's global executive leadership program in France and Germany for 2018-2019.
- Managed site evaluation, selection, and overall transition for two office relocations including an 8000 sq. ft. North American Center of Innovation. Collaborated and worked closely with brokers, designers, landlord and lender.
- Originated and oversaw the successful divestiture of UDI; managed the acquisition strategy serving as a key member of divestiture team in partnership with Legal and Finance groups; led the subsequent business transition.
- Managed the due-diligence, billing and revenue recognition processes after UDI was successfully sold to a PE firm.

UNIFIED DISPATCH, (UDI) A SUBSIDIARY OF TRANSDEV, PASADENA, CA EXECUTIVE VICE PRESIDENT | GENERAL MANAGER

OCT 2012 – FEB 2018

Owned full P&L and operations responsibility for Transdev's UDI Passenger Communications business. Spearheaded and injected a formal product and project management process into the organization, built a qualified QA team, envisioned, advocated and ultimately designed organizational changes and initiatives.

- Oversaw organizational growth of ~400% successfully transitioning Transdev's Unified Dispatch group from an inactive voice response (IVR) focused entity to a full-service product development unit of Transdev North America.
- Integral participant to the closing of a +\$1M sale for multi-year projects, supporting the sales effort, interfacing with the client and bridging the gap between sales closings, implementation and project management.
- Defined, scoped and acquired approval from senior management for a cross-division implementation.
- Achieved annual payroll savings of ~\$2M project managing the strategic implementation of Transdev's Universal Routing Engine (URE) technology at SuperShuttle sites across the United States, automating the global dispatch management process and completing the cross-company, cross-functional initiative 2 months ahead of schedule.

BALLENTINE CONSULTING, VALENCIA, CA OWNER & PRINCIPAL CONSULTANT

JUN 2011 TO OCT 2012

- Provided business customer development, competitive analysis, strategy consulting, and project management for FatCloud LLC. Deliverables included customer service model, building service model into Salesforce, and production of company video.
- Executed strategy, planning, and financial modeling for Next Sports Generation, a youth sports focused social media start-up. Deliverables included business plan, investor pitch decks, data analysis, financial modeling, and product design.

UNIX LLC, BURBANK, CA

APR 2000 TO JUN 2011

MANAGING DIRECTOR, HEAD OF CLIENT SERVICE AND OPERATIONS

Multifaceted, cross-functional role leading all elements of product delivery and support, including customer service, broker-dealer operations, professional services/technical sales, product operations, and business integration teams for this startup software development firm and FINRA broker-dealer.

- Established and managed core of professional teams to support flagship product, providing advanced electronic trading and smart order routing tools to institutional equity traders through its open architecture software and SaaS platform.
- Served on Operating Committee seven consecutive years and led core operation teams through multiple CEO leadership changes.
- Partnered with CTO to lead product delivery process migration from waterfall to Agile. resulting in more efficient product specification processes, shorter development cycles, and greater cross-organization life-cycle collaboration.
- Created innovative onboarding and professional services model that delivered elite customer startup services, ongoing product support, and improved client satisfaction.
- Designed and implemented customer integration process with cross-functional services team to ensure all go-live experiences met or exceeded expectations, achieving 100% client satisfaction with on-boarding process.
- Built & Managed the Project Management Office (PMO).
- Pioneered client issue management and mitigation process, increasing speed of issue resolution and identification of issue trends while also increasing timeliness and effectiveness of internal communication.
- Increased issue coverage per employee and reduced operational risk through design and implementation of enhanced operations and product support tools, streamlined user interfaces, and improved information flows.
- Innovated quarterly home office product and client review processes, enhancing collaboration and communication between headquarters and satellite offices.
- Accepted Interim CCO position, which included Anti-Money Laundering officer duties, to provide compliance stability for UNIX's broker-dealer. Successfully completed a regulatory audit while temporarily managing Chief Compliance Officer duties.
- Additional roles included Director, Electronic Trading Services & Brokerage Operations, Vice President, Customer Service, Senior Business Analyst & Sales Controller.

EDUCATION & CERTIFICATIONS

Bachelor of Science (B.S.), Finance, Cum Laude, High Honors in Finance
Butler University, Andre B. Lacy School of Business

Certified Project Management Professional (PMP) – Project Management Institute

CS50 – Introduction to Computer Science (web track) | Harvard University [via edX, in-process]

Executive Data Science | Johns Hopkins University [via Coursera]

Leading Product Development | Harvard Business School [executive ed, on-site, Boston]

SIFMA Securities Industry Institute | The Wharton School, University of Pennsylvania [executive ed, on site, Philadelphia]

FINRA Licenses (former) Series 4, 7, 24, 55, 63