

# Brandon D. Williams

## SUMMARY

- Highly-motivated, quick-thinking Agile Practitioner proficient in Predictive, Scrum, Lean, Kanban, and other Agile methodologies for SaaS platforms
- Servant Leader with excellent interpersonal and team-building skills
- Experienced in creating and maintaining highly visible information radiators displaying key metrics for project success including burndown/ burnup charts, velocity reports, and risk mitigation matrices
- Experienced engaging with all levels including C- suite, as well as identifying and implementing up-selling opportunities, and creatively solving problems in dynamic environments
- Experienced communicating intricate technical and financial concepts through illustrative written and oral storytelling
- Proficient in Salesforce, Microsoft Outlook, Word, Excel, PowerPoint, G Suite, Jira, Zoho, Pendo, Smartsheets (PMIS) and Trello

## WORK EXPERIENCE

### **Client Success Manager**, AdvisorEngine, New York, NY

Oct 17 – July 19

- Developed and managed over 20 multi-phase, complex financial technology integration projects using Scrum and Agile methodologies for financial institutions with budgets ranging from \$50,000 to \$5M
- Serve as main point of contact for financial firms with assets ranging from \$250M to \$4B, troubleshooting technical issues and resolving 10 to 50 complex financial related issues per day
- Coordinated predictive and agile projects from initiation through delivery—gathering requirements, identifying risk, and managing schedule, scope, budget, resources, risk, quality, communication, and stakeholder engagement
- Served cross-functional teams of 5 to 20 members, facilitated/coached scrum ceremonies including sprint planning, daily stand-ups, sprint reviews and retrospectives
- Responsible for the prioritization of client tickets and needs. Participated in determining solutions and writing user stories resulting in the release of high-value functions and features to clients monthly
- Increased customer satisfaction by 10% by developing and implementing new workflows for onboarding
- Responsible for the design, improvement, and implementation of 10 company-wide cross-functional agile processes which lead to an increase in effectively addressing and resolving client technical issues
- Conducted data analysis and monitored user engagement using several web analytical tools
- Responsible for creating weekly, monthly, and quarterly reports to present to various stakeholders

### **Consultant/Training Specialist**, Hobsons, Arlington, VA

Jan 16 – Oct 17

- Responsible for the development and implementation of education software across 500+ schools in 10 of the largest school districts in the US including Chicago, Los Angeles, Houston, Boston, New York, and Broward County
- Conducted 15 to 20, 2-hour (on-site and online) training sessions per week to audiences ranging from 2 to 40 participants. Ranked highest in customer satisfaction, rated 4.9 out of 5 on surveys by participants
- Created over 100 learning artifacts and instructional presentations for new software product offerings and over 50 customized courses to adapt to unique client needs and environments
- Point of contact for over 500 school superintendents, principals, and high school counselors. Played a key role in determining each school/districts goals and KPI's. Responsible for planning, implementing, and monitoring strategies
- Developed new ways of billing clients for consulting hours, increasing billable hours by 15%

### **Client Solutions Specialist**, Hobsons, Arlington, VA

Jun 14 – Jan 16

- Responsible for maintaining positive relationships with over 1,500 teachers, counselors and superintendents. Served as customers' main point of contact for product support needs
- Identified and logged over 250 user stories in Jira. Played a key role in quality assurance testing of all resolved issues
- Key participant in managing and prioritizing client technical requests ensuring the release of highly valued functions at least once a month
- On average received 50 phone calls per day from counselors with technical issues and questions. Closed on average 75 email tickets per day. Averaged 4.8 out of 5 on 1,000+ customer satisfaction surveys

### **Registered Representative**, Spartan Capital, New York, NY

Jun 11 – March 12

### **Registered Representative**, Olympia Capital, New York, NY

Aug 10 – Jun 11

- Managed stock portfolios for 25 high net-worth clients with investable assets of \$1M+
- Conducted data analysis to identify buying and selling opportunities beneficial to client's unique investment goals
- Prospected for new clients, conducting 500+ cold calls and connecting with up to 80 potential investors daily

### **Account Executive**, Washington Post, Washington, DC

March 09 - Aug 2010

- Researched and developed digital and print ad schedules to maximize impact for specific target demographics
- Generated 10% in new revenue by developing new advertising vehicles and packages
- Handled an average of 20-30 client ad specs, proofs, edits and budget issues per month

## EDUCATION & HONORS

**Bachelor of Arts, Advertising (Psychology minor)**, Howard University, Washington D.C.

**Agile Certified Practitioner (PMI-ACP)**, Project Management Institute

**Certified Associate in Project Management (CAPM)**, Project Management Institute

**Series 7 & 63 Licenses, General Securities Registered Representative**, FINRA

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