

# KATIE KELLY

Senior Implementation & Operations Executive | Enterprise Platform & SaaS Delivery

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## Executive Summary

Strategic customer success and implementation executive driving onboarding and adoption for growth-stage fintech and SaaS platforms. Proven track record scaling customer-facing teams while reducing time-to-value across SMB through enterprise segments. Expert at building scalable onboarding systems, coaching multi-tiered leadership organizations, and partnering cross-functionally to drive retention and expansion.

## Key Achievements

### Team Building & Executive Leadership

Expanded delivery organization from 8 to 20+ within 8 months, establishing a multi-tiered leadership structure that created a scalable foundation for enterprise delivery.

Achieved 35% improvement in departmental efficiency while increasing output by 10% and reducing headcount by 25% through systematic process optimization.

### Client Delivery & Operational Scale

Led 100+ client facing platform and SaaS implementations in regulated financial environments, delivering 95%+ on-time.

Improved time to value by 85% by reducing implementation timelines from 3 months to 6 weeks for SMBs and mid-market clients through systematic onboarding redesign.

### Cross-Functional Development

Set strategic vision for global client delivery operations, directing a 50+ person organization to align delivery standards and enhance client outcomes.

Achieved \$500K in annual savings by leading a cross-functional initiative with Product, Engineering, and Sales to automate a regulated product.

## Experience

### iCapital

New York/Boston

#### Senior Vice President, Operations and Client Delivery

01/2024 - Present

Lead specialized onboarding and implementation operations for an alternative investment fintech platform serving wealth managers, advisors, and asset managers. Own post-sale fund implementation and ongoing product onboarding, reducing time-to-value and driving platform adoption across complex investment structures for SMB and Enterprise segments.

- Leadership & Organization Building:** Built and scaled a client success organization from 8 to 20+ professionals within 8 months, establishing a multi-tiered leadership model with 10+ frontline managers. Created scalable frameworks for hiring, coaching, and career development that elevated team performance and increased manager retention across the organization.
- Platform Scalability:** Built a legacy team of 8 into a dual-team structure of 20+ professionals within 8 months, establishing a multi-tiered leadership model that elevated performance, increased retention, and created a scalable foundation for enterprise delivery. Includes over 10 frontline managers, driving consistent quality and outcomes across 400+ annual onboardings.
- Operational Excellence:** Doubled annual implementation volume from an average of 200 to 400 while resources were reduced by 50%, maintaining enterprise-grade delivery across complex regulatory and integration requirements.
- Client Management:** Rehabilitated 3 of the firm's top 5 enterprise clients within 90 days by implementing systematic issue resolution frameworks and enhancing delivery transparency, preserving multimillion-dollar relationships and restoring long-term trust.
- Cross-Functional Collaboration:** Continuously partner with Product, Sales, and CX to design workflows and feedback loops that strengthened adoption and expansion across accounts.
- Metrics & Reporting:** Instrument dashboards to monitor activation effectiveness, track team productivity, and forecast key business outcomes. Report regularly on performance metrics to senior leadership.

### iCapital

New York/Boston

#### Vice President, Platform Operations & Implementation

04/2021 - 12/2023

Led client success and implementation for enterprise clients, coordinating across Product, Engineering, and Sales to drive seamless onboarding and adoption. Developed scalable processes and performance frameworks that enabled consistent delivery and repeatable customer outcomes.

- Operational Framework Development:** Achieved 35% improvement in departmental efficiency through operational framework implementation, which reduced timelines from 8 to 12 weeks to 10 business days while cutting FTE requirements from 26 to 19 people, and increasing delivery output by 40%.
- Enterprise Implementation Leadership:** Led successful execution of 50+ implementations, each varying in scope and client complexity. Timeline management ranging from 6 weeks to 12+ months for enterprise-level clients requiring multi-stakeholder coordination and complex system integrations.
- Scalable Team Building:** Designed a comprehensive training and onboarding strategy that facilitated a 100% increase in department headcount within 12 months while maintaining quality standards. Reduced new employee onboarding duration by 85% from 3 months to 4 weeks through systematic process development.
- Strategic Automation & Cost Optimization:** Led a strategic automation initiative resulting in \$500K annual cost savings by developing technology to reduce manual intervention through cross-departmental coordination with product, data, and engineering teams.

## Experience

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DebtX

Boston, MA

Director, Operations & Implementation

01/2017 - 03/2021

Led operations and implementation for the enterprise division of a fintech platform serving Fortune 100 clients, government agencies, and institutional investors in the secondary loan sale and distressed asset markets.

**Key Highlights:**

- Built scalable framework, utilizing tech and partnerships, enabling billions in transactions in 4-6 week cycles nationwide. Exceeded industry standards by 60%.
- **Enterprise Program Management:** Managed end-to-end operations for enterprise asset portfolio transactions ranging from \$75MM to \$5B, including complex settlements, data analysis, and multi-party coordination, ensuring accurate processing and compliance.
- **Operations Leadership:** Delivered over \$1B in client outcomes across 200+ implementation projects, managing 250,000 assets with \$45B total portfolio value while maintaining operational excellence across diverse enterprise requirements.
- **Cross-Functional Execution:** Oversaw project execution with budgets ranging from \$10K to \$100K while generating revenue from \$400K to \$10MM+ per engagement through systematic coordination across legal, compliance, and technical teams.

Associate Director, Operations & Implementation

01/2013 - 12/2016

**Key Highlights:**

- **Complex Program Execution:** Led due diligence operations for the largest enterprise asset transaction in company history (30,000 assets, \$5B) for the US Department of Housing and Urban Development, requiring multi-stakeholder coordination and government compliance protocols.
- **Operational Innovation:** Created software automating due diligence for \$5B portfolio, cutting costs by \$75K annually and boosting operations by 50% through process optimization.
- **Team Building:** Built a 100-person team with 24-hour onboarding time. Efficiency reduced overhead costs by 30% demonstrating the ability to scale operations rapidly while maintaining quality standards.

Additional Roles at DebtX:

01/2008 - 12/2012

- Vice President, Client Delivery & Operations (2011-2012) | Assistant Vice President, Due Diligence & Technology Solutions (2010-2011) | Project Manager, Due Diligence & Technology Solutions (2008-2010)

## Education

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New England Law | Boston

Boston, MA

Juris Doctor (J.D.)

- Legal training provides an analytical framework for risk assessment and complex analysis within regulated environments and enterprise clients.

Providence College

Providence, RI

B.A. | Division I Field Hockey - Captain

- Athletic leadership experience for team-building principles, performance accountability, and high-pressure execution. Foundational skills for building cohesive, high-performing operational teams.

## Skills

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Strategic Vision & Client Delivery • Operations Scale & Change Management • Regulated Platform Operations • Cross-Functional Leadership • Strategic Team Building • Process Design & Optimization