

# COLLIN LAWRENCE

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## EXPERIENCE

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### **PRODUCT MANAGER, SS&C Advent Black Diamond** (Jacksonville, FL)

**3/22 – Present**

*Award-Winning Wealth Analytics Platform Reporting on \$2.2 Trillion in Assets*

- Owned and directed massive-scale multi-business product integration which boosted end-user productivity by over 700% and also launched us as a competitor in a completely new market segment
- Led product team of six engineers and implemented enhanced agile methodologies including daily standups and regular-interval sprints saving over 200 hours per year and \$67,000 in lost productivity
- Pared down backlog by 50% to enable rapid development of critical products
- Designed and led usability study spanning clients with responsibility over assets of more than \$10B and used this to set overall direction for entire platform component resulting in 100% retention of existing users
- Implemented usage analytics to quantify relevance of legacy platform components and remove them as needed to materially reduce ongoing support and development costs by 20%

### **SOLUTIONS CONSULTANT, Addepar** (Salt Lake City, UT)

**9/19 – 3/22**

*Industry-Leading Wealth Analytics Platform Reporting on Over \$2.7 Trillion in Assets*

- Leveraged product management mindset to create an extremely successful services product which garnered and preserved hundreds of thousands of dollars in ARR and boosted client retention by 25%
- Served as charter member of services sales team and pioneered core processes and workflows which resulted in 500% increase in scoping and estimation efficiency
- Served as communications hub for five independent departments
- Created multiple dashboards which served as team's analytics backbone to understand user issues
- Used deep project management skills to deploy numerous client implementations on time and under budget

### **CLIENT ADVISORY ANALYST, Tolleson Wealth Management** (Dallas, TX)

**10/17 – 9/19**

*Full Service, Award-Winning Multi-Family Office with Over \$6B AUM*

- Utilized financial technology to communicate complex topics to clients, create workflow efficiencies, streamline reporting projects and develop actionable solutions to a variety of client issues
- Leveraged emotional intelligence and financial advisory skills to build strong relationships with clients and effectively integrate five independent departments to achieve superior results in serving client needs
- Consulted with EVP of Tolleson Private Bank on strategic issues and developed custom interest-rate product using Excel modeling and finance acumen

### **CONSULTING ASSOCIATE, Moss Adams, LLP** (Dallas, TX)

**8/16 – 10/17**

*Largest Public Accounting & Consulting Firm Headquartered in Western U.S.*

- Utilizing critical thinking, Excel modeling and analytical skills, delivered self-managed projects to successfully increase client profitability
- Executed restructuring projects and developed creative solutions to minimize client losses
- Used business acumen to independently solve critical issues facing firms in a variety of industries

## EDUCATION

BRIGHAM YOUNG UNIVERSITY, Provo, UT – Graduated 2016

**Bachelor's Degree, BGS: Emphasis in Business Management**

*Finance Coursework GPA: 3.7*

## ADDITIONAL SKILLS AND INTERESTS

- **Other Skills & Achievements:** Agile Project Management, Jira, SQL, Javascript, HTML, CSS, Tailwind, React, Gatsby, GraphQL, Confluence, Looker, GitHub, Figma, Adobe Creative Suite, Eagle Scout