

# DANIEL W. MARTILLOTTI

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## SUMMARY OF QUALIFICATIONS

Accomplished Senior Manager with responsibility for coordinating and directing implementation, customer service, and training activities to include developing methodologies and best practices, managing escalations, and assisting sales and account management. Repeatedly delivers strong, sustainable results, and client satisfaction. Persistent goal setter with exemplary integrity, reliability, and loyalty. Highly motivated, enthusiastic, and committed to professional excellence, while balancing the needs of client with the needs of the company.

## CORE COMPETENCIES

- Team builder/leader/mentor
- Change manager
- Forecasting and planning
- Performance management
- Conflict resolution
- Project management
- Implementation
- Customer service
- Client education
- Account management
- Product life cycle management
- Product management
- Problem solving
- Quality control
- Strategic planning

## PROFESSIONAL EXPERIENCE

**Procura, LLC, Austin, TX**

6/2010 to present

### **Managing Director**

Responsible for day-to-day management of the industry leading credit union service organization (CUSO) that sales and supports Purchase One for managing purchasing card programs and HSA Protrak for managing healthcare savings accounts (HSAs).

- Directed the Purchase One technology transition and conversion of all active members to the new platform – on time and under budget.
- Manage the relationships with our technology partners – AOC, TSYS, Tango Health, and Western Bridge Federal Credit Union.
- Collect enhancement requests from members, prioritize and refine them, and write them up as business requirements for our technology partners.
- Wrote multiple proformas to help evaluation the correct financial and strategic direction for the CUSO.
- Manage relationships with several key credit unions.
- Manage an operating budget of over \$3,000,000.
- Present the financial overview and operating updates to the board of managers at scheduled board meetings.

**Teres Solutions / CRIF Lending Solutions, Austin, TX**

5/2009 to 6/2010

### **Manager of Implementations**

Managed to team of implementation project managers and software deployment specialists responsible for implementing direct and indirect loan origination systems for credit unions and banks.

- Developed project plan templates for all implementation projects, initiated use of project management software, and revamped the implementation process to include standard processes and milestones.
- Developed and rolled out a new software deployment process.
- Developed and rolled out a software release management process.
- Managed several key client relationships.

**Bank of America, Austin, TX**

10/2005 to 2/2009

**Senior Client Fulfillment Manager, Senior Vice President (5/2008-2/2009)**

Managed five regional teams responsible for implementing traditional treasury services for companies.

- Migrated all treasury clients from LaSalle bank solutions to Bank of America solutions as a part of the LaSalle acquisition.
- Beta-tested the use of Live Meeting by implementation advisors with clients to review documentation in order to decrease time-to-revenue.
- Started bi-weekly meetings with sales managers to discuss outstanding issues and review team metrics.

**Senior Change Manager / Product Manager, Senior Vice President (10/2005-5/2008)**

Managed eight teams across three locations responsible for implementations, client service, vendor enrollment, and client education of the Works software.

- Incorporated the legacy Works and Bank of America implementation teams into a single, cohesive team.
- Migrated over 1000 clients from a legacy Bank of America platform and implemented over 1,400 clients responsible for over \$1.4 billion in revenue.
- Exceeded 95% client satisfaction on implementations, client service, and client education.
- Wrote requirements, negotiated software release contents, and maintained the product road map.

**Works, Austin TX**

8/2000 to 10/2005

**Director, Implementation and Client Service (12/2002-10/2005)**

Managed teams responsible for implementations and client service of the Works software.

- Grew the team from two members to twenty-five in support of business growth.
- Managed five partner bank relationships as it related to implementation, client service, and training.
- Implemented over 450 clients during this time period. At maturity, those programs were responsible for enough revenue (over \$10 million) to make Works a profitable company.
- Trained clients and employees on new releases of the Works software.
- Supported sales and account managers. Participated in several best-and-final presentations.

**Manager, Software Development (8/2000-12/2002)****ClearCommerce, Austin TX**

6/2000 to 7/2000

**Program Manager****Tivoli Systems/IBM, Austin TX**

3/1995 to 6/2000

**Development Manager (6/1997-6/2000)****Senior Technical Writer (3/1995-6/1997)****Ronald Luke & Associates, Austin TX**

3/1993 to 2/1995

**Training/Documentation Specialist****Century Design, Austin TX**

9/1990 to 3/1993

**Technical Writer****ACADEMIC CREDENTIALS, RELEVANT TRAINING, AWARDS, AND COMMUNITY CONTRIBUTIONS**

- **Bachelor of Science** - Texas A&M University, June 1990
- **Seven Habits of Highly Effective People** - 1996
- **Behavioral Interviewing Techniques** - 1997
- **Works Bell Ringer Award** - 2003
- **Bank of America Award of Excellence** - 2006
- **Assistant Scoutmaster, Boy Scout Troop 171**, 2005 - present
- **Lakewood Country Estates LOA Secretary** 2003-2004, **President** 2005-2006