

KATIE KELLY

Platform Operations & Implementation

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SUMMARY

FinTech platform specialist with 15+ years focused on operations, implementation, and team management. Proven track record of successfully scaling FinTech platforms during high-growth phases. Adept at driving operational excellence, optimizing processes, and building high-performing teams. Known for developing training programs, resource models, and operational frameworks that have led to substantial efficiency improvements and significant business expansion.

SKILLS

Operational Excellence

Team Building & Leadership

Implementation Management

Client Relationships

Resource Modeling

Cross-Functional Coordination

Platform Scaling

Process Improvement

EXPERIENCE

Vice President of Operations and Implementation

iCapital

📅 04/2021 - Present 📍 New York, NY

iCapital is a FinTech platform specializing in alternative investments for banks, asset managers, and financial advisors. I currently lead a client-facing team of implementation managers, working cross-functionally with product, support, and sales for efficient execution. I oversee a lean team, establishing processes to enhance efficiency and scalability within the department.

- Scaled department operations, yielding a 100% headcount expansion and driving a 75% increase in operational efficiency over an 12-month period.
- Led successful execution of 50+ implementations to date each varying in scope and client size. Timelines range from 6 weeks to 12+ months. Notable clients include wire houses, banks, investment advisory firms, and fund managers.
- Designed a comprehensive training and onboarding strategy that facilitated a twofold increase in department headcount within 12 months. Reduced onboarding duration by 85% from 3 months to an efficient 4 weeks.
- Developed a resourcing model to staff and monitor deal flow of a 50+ person department both domestic and global team, resulting in streamlined operations and enhanced team cohesion.
- Implemented an operational framework leading to 75% increase in departmental efficiency and productivity over 12 months.
- Initiated the development of a fully automated solution that led to an annual cost reduction of \$500,000 for a prominent wire house. Execution required seamless cross-departmental coordination with the product, data, and engineering teams.

Director of Operations and Deal Management

DebtX

📅 12/2008 - 03/2021 📍 Boston, MA

Roles: Contract Attorney (2008) → Project Manager (2009) → Assistant Vice President (2010-2011) → Vice President (2011-2012) → Associate Director (2013-2016) → Director (2017-2021)

Led operations and deal management for a secondary market loan sale platform. Clients include Fortune 100 banks, investment banks, government agencies, fund managers, and private investors.

Key Highlights:

- **Operational Excellence:** Developed fully scalable operations for loan sale division of fintech platform. Managed over 200 projects end-to-end. Portfolios totaling over 250,000 assets and a \$45B balance. Budgets range from 10K to 100K and revenue ranges from \$400M to over \$10MM. Reduced overhead by 80% within 24 months.
- **Technology & Implementation:** Designed a proprietary software to automate due diligence for a \$5 billion residential portfolio that reduced annual expenses by \$75k and increased throughput by 50%.
- **Product Development:** Developed a product roadmap and framework to liquidate \$2 billion dollars of residential loan sales within 4-6 weeks on behalf of major banks and investment banks where the investors were hedge funds and private equity firms. Beating industry standard by 60%.
- **Team Building:** Built a 100-person team with 24-hour onboarding time. Efficiency reduced overhead costs by 30%.

EDUCATION

B.A. | Captain Div. I Field Hockey

Providence College

📅 09/1999 - 05/2003

Juris Doctor (J.D.)

New England School of Law

📅 09/2004 - 05/2007

TECHNICAL SKILLS

API

Data Synchronization/ETL

SAML Authentication

Ruby On Rails

DocuSign

AWS

PowerBI