

KATIE KELLY

Client Operations & Customer Success Leader | Retention, Scale, and AI Adoption

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EXECUTIVE SUMMARY

Operations and client delivery leader who builds the teams, operating models, and systems that turn client growth into retention and expansion. Track record leading multi-level, customer-facing organizations at growth-stage fintech platforms across SMB, Mid-Market, and Enterprise, including a consumption-based platform where fee revenue grew with client adoption and transaction volume.

Owned a 100+ account Mid-Market portfolio that grew to \$50M in annual fee revenue. Built a 25-person organization in 12 months while doubling throughput. Prevented \$20M+ in churn through systematic enterprise account turnaround. Now deploying Claude inside owner-led businesses with a process-first approach. The core capability: turning operational strain into repeatable delivery, and new tools into adopted ones.

KEY ACHIEVEMENTS

Client Portfolio & Revenue Protection

- Owned delivery and client outcomes for a 100+ account Mid-Market portfolio that grew to \$50M in annual fee revenue on a transaction-based platform.
- Prevented \$20M+ in revenue churn by rehabilitating 3 top enterprise accounts experiencing delivery breakdowns. Implemented quality control gates, escalation protocols, and strategic staffing that restored expansion readiness and retention.

Organizational Scale & Team Building

- Built an organization of 25+ professionals (5+ managers) in 12 months, establishing scalable frameworks for hiring, coaching, and career development that supported 2x throughput growth.
- Redesigned operating model for a 50-person global organization, introducing segment-based coverage that achieved 60% efficiency improvement and 20% higher output despite a 25% workforce reduction.
- Stood up a 100-person operational team with 24-hour onboarding capability while reducing overhead 30% and maintaining compliance and delivery standards.

Systems Design & AI Adoption

- Designed a scalable delivery model that doubled annual throughput from 250 to 500+ implementations while maintaining enterprise-grade quality through standardized playbooks, readiness criteria, and coverage ratios.
- Cut time-to-market 75% (from 8 weeks to 2 weeks) through systematic process redesign, SOPs, and role-task matrices, enabling growth without proportional headcount increases.
- Built 10+ custom Claude skills and agentic workflows for owner-led businesses; cut one client's invoice turnaround from 90 days to 2 weeks and returned 25 hours a month to the owner.

EXPERIENCE

D1 Ops

Boston, MA

Founder & Executive Operating Partner

2026 - Present

Founded D1 Ops to provide embedded executive leadership to growth-stage, owner-led commercial businesses navigating rapid growth and increasing operational complexity. Partner directly with founders and CEOs to identify the financial and operational constraints limiting growth, then lead execution across financial operations, business operations, project delivery, organizational design, compliance, and technology.

- Executive Operating Leadership:** Serve as an embedded partner to founders and CEOs, taking ownership of complex cross-functional priorities that fall between traditional functional roles. Resolved a client banking security incident and restored payment controls within 48 hours.
- Financial & Operational Performance:** Strengthen cash conversion, invoicing and receivables, job economics, margin visibility, forecasting, and executive reporting. Cut one client's invoice turnaround from 90 days to 2 weeks.
- Operating Model Transformation:** Diagnose end-to-end operations from business development through project delivery, closeout, billing, and collection; redesign processes, ownership, controls, and management cadence for scale. Returned 25 hours a month to the owner.
- Growth Infrastructure:** Build the financial, operational, and management infrastructure required to support larger clients, contracts, teams, and organizational complexity.
- Technology & AI:** Apply AI and automation to reduce manual work and improve financial and operational visibility, with a process-first approach to implementation. Built 10+ custom Claude skills and agentic workflows spanning billing, job costing, research, and reporting.
- Product Build:** Built and shipped a consumer iOS app with Claude as engineering partner: Postgres database with row-level security, authentication, API integrations, serverless functions, rate limiting, and transactional email. Approved on first App Store submission.

iCapital

Senior Vice President, Head of US Platform and Client Operations

Led operational strategy and execution for a transaction-based alternative investment platform serving wealth managers, advisors, and asset managers. Owned organizational structure, operating model, and delivery systems with operational cost accountability across Enterprise, Mid-Market, and SMB segments.

- Organization Design:** Built a multi-layer organization to 25+ professionals (5+ managers) in 12 months, establishing scalable frameworks for hiring, coaching, and career development that supported 2x throughput growth.
- Operating Model:** Designed delivery systems enabling 500+ annual implementations. Cut time-to-market by 75% through standardized playbooks and coverage ratios; scaled output with better systems, not more headcount.
- Revenue Protection:** Prevented over \$20M in churn by rehabilitating top enterprise accounts. Implemented quality control gates, escalation protocols, and strategic staffing that restored expansion readiness and retention. Reduced enterprise escalations by 20%.
- Operational Efficiency:** Scaled throughput 2x without proportional headcount or cost increase.
- Executive Partnership:** Developed a cross-functional escalation model with Product and Engineering. Translated client needs into roadmap priorities. Standardized sales-to-delivery handoffs, achieving 98% configuration readiness.
- Performance Management:** Designed dashboards tracking implementation volume, time-to-market, team productivity, and SLA performance. Used data to identify bottlenecks and forecast capacity for executive reporting.
- New Division Build:** Launched technology and data operations division from scratch for a previously neglected product area. Established team structure, processes, and delivery model. Rehabilitated the relationship with the largest client of this product.

New York/Boston

01/2024 - 11/2025

iCapital

Vice President, Operations & Implementation

Stepped into a 50-person global organization experiencing scaling challenges. Diagnosed organizational gaps, designed a comprehensive operating model transformation, and took direct ownership of execution for Mid-Market and SMB segments.

- Portfolio Ownership:** Owned delivery and client outcomes for a 100+ account Mid-Market portfolio that grew to \$50M in annual fee revenue on a transaction-based platform.
- Operating Model Transformation:** Redesigned operating model achieving 60% efficiency improvement (394 to 629 annual production hours per employee) and 20% output increase despite 25% workforce reduction.
- Process Design:** Improved time-to-value 50% (3 months to 6 weeks) for Mid-Market and SMB implementations, bringing transaction volume and revenue forward for newly onboarded clients.
- Automation:** Led cross-functional initiative with Product, Data, and Engineering, delivering \$500K annual cost savings through technology-enabled process elimination.
- Team Building:** Reduced new hire ramp time 85% (3 months to 4 weeks) through systematic training design, enabling 50% headcount increase while maintaining quality standards.

New York/Boston

04/2021 - 12/2023

DebtX

Associate Director to Director, Operations & Implementation

Led operations for an enterprise fintech platform serving Fortune 100 clients, government agencies, and institutional investors in secondary loan and distressed asset markets. Progressive leadership across tenure.

- Developed execution framework enabling multi-billion-dollar transactions in 4-6 weeks, outperforming industry standards by 60%.
- Led the largest enterprise transaction in company history (\$5B, 30,000 assets) for the US Department of Housing and Urban Development. Managed multi-stakeholder coordination and government compliance.
- Stood up a 100-person operational team with 24-hour onboarding capability. Reduced overhead 30% while maintaining compliance and delivery standards.
- Delivered \$1B+ in client outcomes across 200+ implementations; managed budgets (\$10K-\$100K) and revenue (\$400K-\$10MM+).

Boston, MA

01/2010 - 03/2021

Earlier Roles at DebtX:

- Vice President, Client Delivery & Operations | AVP, Technology Solutions | Project Manager, Due Diligence

EDUCATION

New England Law | Boston

Juris Doctor (J.D.)

Providence College

B.A. | Division I Field Hockey - Captain

Boston, MA

Providence, RI

CORE CAPABILITIES

Client Operations & Customer Success · Retention & Expansion · Consumption-Based Models · AI Adoption & Change Management · Operating Model Design · Team Building & Leadership · Process & Systems Design · Cross-Functional Execution · Data-Driven Decision Making