

**Dean Reese**  
**Technology & Payments Delivery Leader**

## **EXECUTIVE SUMMARY**

Delivery-focused technology leader with 10+ years of experience guiding banks, credit unions, and fintechs through complex payments, digital banking, and platform modernization initiatives. Experienced people manager with direct and dotted-line leadership across delivery, operations, and client advocacy teams, and a proven ability to lead both senior and junior professionals within regulated financial environments. Brings operational P&L ownership at the bank level, along with delivery forecasting and utilization planning in SaaS organizations. Known for stabilizing distressed programs, leading cross-functional teams through ambiguity, escalations, and high-pressure implementation cycles, and serving as a trusted advisor to executive stakeholders. Skilled in delivery governance, financial forecasting, and driving outcome-focused execution in compliance-sensitive environments.

## **PAYMENTS & BANKING EXPERTISE**

- Banking & Payments Technology Delivery
- Core Banking & Digital Banking Integrations
- Bill Pay, Loan Payments, ACH & Money Movement
- Executive Advisory & Escalation Leadership
- Cross-Functional & Partner Team Leadership
- Delivery Governance, Frameworks & Playbooks
- Operational P&L, Budgeting & Forecasting
- Regulated Environments (FFIEC, NACHA, SOC)

## **PROFESSIONAL EXPERIENCE**

**Paymentus, Remote** **July 2025 – Present**

**Account Director II – Banking & Fintech Delivery**

- Own post-sale delivery and operational success for enterprise banking and fintech clients leveraging the Paymentus Instant Payment Network (IPN), including Bill Pay, Loan Payments, A2A transfers, and digital money movement.
- Act as the primary delivery lead, coordinating Product, Engineering, Implementation, Compliance, Support, and external partners to ensure stable, supportable outcomes.
- Lead delivery during high-severity escalations, production incidents, and go-live readiness efforts for complex bank implementations.
- Serve as the executive escalation point for bank stakeholders, guiding resolution strategy, communication, and risk management.
- Provide delivery forecasting, risk assessments, and capacity planning inputs to leadership to support resource alignment and delivery quality.
- Mentor senior and junior delivery contributors through influence, setting engagement standards and escalation expectations.

- Lead and coordinate cross-functional delivery teams consisting of Product Managers, Engineers, Support Leads, and Implementation Specialists.
- Function as day-to-day delivery leader for senior consultants and technical SMEs assigned to client engagements.

**KlariVis, Remote**

**July 2023 – July 2025**

**Client Success & Training Manager**

- Led delivery and enablement engagements for 40+ banks and credit unions using core-connected analytics platforms integrated with Jack Henry and Fiserv.
- Managed and coached a team of Client Advocacy and Enablement Leads, responsible for onboarding, training, and executive engagement.
- Transformed the delivery model from reactive support to proactive advisory engagement focused on value realization and operational adoption.
- Designed and implemented structured engagement frameworks, success plans, and escalation paths.
- Partnered closely with Product and Engineering to align platform capabilities with client operational workflows.
- Built and governed a centralized knowledge base and training program to reduce dependency on tribal knowledge.
- Directly managed 5 Client Advocacy Leaders.
- Responsible for hiring input, onboarding, performance coaching, and professional development.
- Supported delivery forecasting, utilization planning, and engagement prioritization to meet revenue and margin targets.
- Improved delivery efficiency through standardized onboarding and enablement processes.

**First American Docutech, Remote**

**May 2021 – June 2023**

**Technical Customer Relationship Manager**

- Owned technical delivery and executive relationships for Platinum-tier financial services clients.
- Led cross-functional delivery teams through compliance-driven lending and payments implementations.
- Served as escalation lead for complex production and delivery issues, coordinating Engineering, Product, and Support teams.
- Supported renewals and expansion through trusted advisory relationships.

**Trust Company Bank, Memphis, TN**

**March 2010 – April 2016**

**Director, Banking Technology & Payments Operations**

- Led banking technology and payments operations supporting core banking, consumer payments, authentication, and fraud platforms.
- Held full operational P&L responsibility for technology and payments operations, including staffing, vendor contracts, licensing, and support costs.
- Owned annual budgeting, forecasting, and variance analysis in partnership with corporate finance.
- Managed and developed operations managers and senior analysts responsible for day-to-day payments and fraud operations.

- Served as a trusted advisor to executive leadership during audits, incidents, and major system changes.
- Led remediation efforts tied to FFIEC, AML, KYC, and payments compliance findings.
- Direct management of Engagement Managers and Operations Leads.
- Oversight of 6+ technology and operations professionals.
- Accountable for multi-million-dollar operating budget.
- Implemented forecasting and cost-control practices to improve financial predictability and delivery stability.

## **EDUCATION**

Associate of Science, General Studies, Volunteer State Community College

## **CERTIFICATIONS**

Artificial Intelligence Governance Professional (AIGP) – IAPP

AI in Financial Services (Upstart)

AI Agents Fundamentals (Hugging Face)

ITIL 4 Foundations – Axelos

Digital Product Management – University of Virginia

Product Analytics – Product School

Six Sigma Yellow Belt

Freshdesk Admin Expert – Freshworks

Google IT Support Professional Certificate