FRED CADENA

Digital Transformation Strategist at the
Intersection of FinServ & Technology

PERSONAL PROFILE

Experienced Financial Services Executive with 15+ years of industry experience paired with 12+ years experience delivering business value leveraging the Salesforce platform.

As a leader in the Salesforce and digital transformation space, Fred has developed thought leadership, delivery capability, and Salesforce & ISV partner relationships to scale leading Salesforce ecosystem system implementation partners.

Fred has extensive experience delivering value to clients through his capabilities in business strategy, customer experience, and technology to enable business transformation across all sectors of Financial Services including Banking, Wealth & Asset Management, Insurance, and Capital Markets.

AREAS OF EXPERTISE

- Scaling consulting businesses
- Go-to-market & sales strategy
- Building alliances & channel partnerships
- Cross-cloud Salesforce platform solutions
- Financial Services industry
- Leveraging data for business outcomes

CONTACT ME AT:

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CAREER HISTORY

Silverline CRM

Managing Director, Financial Service Strategy (3/2021 - 5/2021)
Vice President, Financial Service Strategy (1/2019 - 3/2021)
Sr. Director, Financial Services Solutions (6/2017 - 1/2019)

Go-to-Market, Sales & Strategy leader for the Financial Services practice at Silverline. Directly responsible for practice pipeline & bookings goals. Focused on developing & executing Silverline's market strategy, thought leadership, and client solution approach across all Financial Services industry sub-verticals: Banking & Lending, Wealth & Asset Management, Insurance, and Capital Markets.

- Exceeded Financial Services practice bookings goals in 2019, 2020, and 2021.
- Develop & maintain Silverline's key channel partnerships such as nCino, Vlocity (SFI), & Ellie Mae.
- Identify opportunities to partner with other Financial Services organizations and Salesforce ecosystem partners to construct curated solutions that deliver best-in-breed capabilities
- Partner with key clients to transform customer & employee experience leveraging technology, business process optimization, & organizational change management.
- Develop Silverline's point of view on industry trends, challenges, and business goals of leading Financial Services organizations.

Accenture

Senior Manager - Wealth Management Lead (3/2016 - 6/2017)

Senior Manager in Accenture's Cloud First Applications Team with responsibility for leading multiple client engagements and developing Accenture's Wealth Management practice.

- Define & design Accenture's industry accelerators for wealth management
- Work with prospective clients to share Accenture's industry experience & best practices for the implementation and use of Salesforce solutions for financial services
- Support new delivery engagements as an industry subject matter expert to ensure the setting of the proper direction and scope of each implementation
- Delivery Lead and Solutions Architect with responsibility for multiple concurrent Salesforce projects with ownership of client satisfaction, staffing, on-time delivery, and revenue.
- Support sales activities, including cost/effort estimation, and crafting proposals/contracts
- Partner with Salesforce business development teams in joint client pursuits

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CAREER HISTORY - CONTINUED

Cloud Sherpas

Senior Manager & Senior Solutions Architect (1/2015 - 3/2016)

Manage multiple Salesforce.com implementation workstreams for enterprise clients. Responsible for ensuring successful implementations on time and budget with high client satisfaction.

- Responsibility for multiple concurrent Salesforce projects
- Lead and support the successful definition and delivery of client salesforce.com engagements
- Support sales activities, including cost/effort estimation, and crafting proposals/contracts
- Provide expert guidance on industry best practices and process optimization Industry thought leadership and solution vision for our clients

Charles Schwab

Senior Manager (9/2011 - 1/2015)

Senior leader with additional scope of responsibilities outside optionsXpress Business Unit following the acquisition of optionsXpress by Charles Schwab:

- Salesforce Global Governance: Responsible for advising on technical & functional architecture of the Salesforce CRM application of multiple Salesforce instances across various Schwab business units. Provided recommendations on achieving business outcomes, program governance and setting strategic direction of the Salesforce product within Schwab globally.
- Broker Consolidation Transition: Responsible for middle & back office transformation plan for the conversion of optionsXpress & BrokersXpress clients to the Schwab platform.

optionsXpress

Vice President (3/2004 - 1/2015)

Series 7/24/27 licensed senior level manager with a 10 plus year career at company. Responsibilities included CRM, Credit Risk, and Operations Technology Modernization.

CRM Director (Salesforce) -

Responsible for technical & functional architecture of Salesforce CRM application within optionsXpress. CRM portfolio consisted of two Salesforce.com implementations with a total user base exceeding 250 users.

- Responsible to each of the leaders of optionsXpress functional areas (Sales, Marketing, Customer Service, etc) in terms of meeting Salesforce expectations and setting future direction of the CRM tool.

Operations Technology Modernization -

Oversaw various brokerage operations projects from initial discovery through launch and rollout.

- Designed and implemented trade matching & reconcile automation
- Designed and implemented improvements to pledge & release process
- Designed and implemented unclaimed property reporting system for all 53 US reporting jurisdictions
- Developed process and framework to comply with SEC Lost Securityholder Regulations

Credit Risk -

Responsible for managing department that monitors and maintains retail stock, option, and futures credit risk and margin requirements. Department staff is also responsible for communicating with retail & institutional customers concerning the impact of requirements on their accounts. Also had responsibility for monitoring market risk exposure at the account and firm-level.

- Developed and implemented overall firm risk policy and risk assessment
- Ensure firm complies with FINRA and CBOE margin requirements through the monitoring of customer accounts.

ACADEMIC BACKGROUND

Eastern Oregon University

BS Business Administration – Marketing and International Business