

DANIEL M. LEVINE, PHD

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solving the challenges where people and technology meet

TECHNOLOGY LEADER

IT leader/technologist obsessed with collaboration and impact. Continual history of significant contribution to technology delivery and sustainable organizational growth.

- Deep and broad technologist and executive with affinity for highly complex situations and an ability to leverage decades of experience to help groups solve any technical challenge.
- Expertise in data architecture, application development, and business intelligence.
- Brings endless curiosity, creativity, courage and an insistence on quality to implementing long-lasting change in technical, human, and collaborative practices.
- Provides strategic direction and tactical leadership across multiple domains.
- Finds alignment between IT and organizational objectives and executes plans that span both.
- An expert in performance management, from individuals, to teams, to the enterprise.

KEY STRENGTHS

Application & Digital Development. Product vision; product architecture; product development.

Artificial Intelligence. Machine learning, generative AI, assessment & integration.

Change. Change management; talent development; culture transformation.

Data. Architecture; management; advanced analytics & BI; data engineering.

Delivery. Agile methodologies; Dev/Ops and CI/CD processes; product, project, program & portfolio management.

Security. Governance, risk & compliance; data privacy, infosec practices.

Strategy. Business, data, and technology strategy; executive strategic planning.

PROFESSIONAL EXPERIENCE

Chief Technology Officer

Money Management International | Houston, TX

Jan 2011 – Oct 2024

Promoted from front-end technologist (DBA/SQL Architect) to IT Manager (2013), Vice President of IT (2017), and, in 2019, the first CTO in MMI's 45+ year history.

Led all aspects of IT, from systems infrastructure to support services to advanced analytics and business intelligence to in-house software development, as well as administrative oversight and professional development of a staff of 35+ under an annual budget of \$15MM+.

- **Digital transformation**, resulting in industry leading digital experience supporting historically high levels of revenue and service delivery. Projects included total recreation of web presence; creation of change management practices for ongoing management of digital content and platforms; launch of a multi-platform mobile application; and integration of digital and operational analytics and insights.

- Overall **culture change** regarding technology and its relationship to mission and operational goals, including formalization of both Agile and ticket-based methodologies across different facets of IT and the integration of performance analytics into routine operations.
- Transformation towards a **digital-first, cloud-first** and **security-first** organization, resulting in industry leading information security practices (including HIPAA and CARD Act compliance), as well as fully audited and externally certified PCI-DSS compliance. Oversaw multi-year cloud transition across all enterprise facets.
- Year-over-year **budget adherence** while navigating significant disruption during and after the pandemic. Responsible for all aspects of budgeting, projections, and financial reporting on organizational technology spend and support within the context of annual funding of \$30MM to \$50MM.
- Cultivated a culture of **collaboration and transparency**, driving organizational-best employee retention and satisfaction scores.

President

DMLCo | Houston, TX

1996 - 2012

Founded and led a first-wave web development and IT consultancy, overseeing all aspects of the organization, including financial management, strategic planning, and service delivery. Developed in-house CMS eventually hosting dozens of content-driven websites.

TECHNOLOGY PORTFOLIO

Proven ability to apply technology patterns to emerging technologies across multiple revolutions in the industry. Contemporary expertise includes

- Decades of depth with the Microsoft stack, from desktop applications through productivity tools through Azure-based platform management.
- Data and BI tools spanning T-SQL query creation and optimization, multi-node server configuration, data visualization via PowerBI and Tableau, and advanced analytic & machine learning platforms like DataRobot.
- Thorough understanding of content management platforms, most recently SiteCore and WordPress, but also encompassing the architecture, development, and refinement of proprietary systems.
- An endless array of application development management tools, most recently Azure Dev/Ops connected with JIRA, Slack, and Teams.

EDUCATION

PhD, Religious Studies

Rice University | Houston, TX

Developed and taught courses focused on global perspectives on literature, culture, and religion at Rice University and University of Houston Clear Lake.

BA, English

Columbia University | New York, NY