

RENATO MILJATOVIC

Aledo, TX | (817) 727-2800 | miljatovic.renato@gmail.com

www.linkedin.com/in/renato-miljatovic

www.renatomiljatovic.com

SUMMARY

Strategic Executive Leader with 15+ years of experience driving growth, operational excellence, and digital transformation across insurance, financial services, and accounting sectors. Proven track record of scaling multi-state operations, leading cross-functional teams of 100+, and delivering measurable results including 35% revenue growth and 32% cost reduction. Adept in P&L management, compliance strategy, M&A due diligence, and client retention. Known for leveraging technology to streamline workflows, enhance customer experience, and improve organizational efficiency. Seeking executive leadership opportunities where innovation, strategic planning, and stakeholder alignment are key to success.

Technical & Functional Skills

- HubSpot, ClickUp, Asana, Salesforce
- Tableau, SQL, Balsamiq
- CRM & ERP Workflow Automation
- Microsoft Office Products
- Agile & Waterfall Methodologies
- Project Management
- Lovable.dev
- Virtual Team Management

Core Competencies

- Strategic Planning & Execution
- Operational Efficiency
- Business Transformation
- Change Management
- P&L Management
- Regulatory Compliance
- Cross-Functional Leadership
- Data-Driven Decision Making
- M&A Due Diligence
- Client Retention Strategy
- Digital Workflow Optimization
- Employee Engagement & Culture

PROFESSIONAL EXPERIENCE

President

April 2024 – Present

Kurv Inc. | Crowley, Texas

- Headed a team of 137 employees, including 7 direct reports, overseeing multi-location operations to drive efficiency, profitability, and strategic growth in accounting sector*
- Automated reconciliation processes by integrating AI intelligence into the workflow, reducing turnaround time from 14 days to 2 days and improving accuracy
 - Transitioned clients from an exiting partner to a new service lead, achieving a 99% client retention rate through proactive communication and personalized onboarding
 - Planned and executed a comprehensive exit strategy for the business, aligning stakeholders and ensuring operation continuity during transition
 - Engaged with partners and executive leadership to establish a centralized billing department, reducing accounts receivable collections from 105 days to 11 days
 - Utilized data-driven insights to optimize resource allocation, leading to a 20% reduction in operational costs while maintaining service quality

- Developed and deployed a predictive analytics model leveraging historical billing and client data, improving budget accuracy by 28% and enabling strategic investments that delivered a 12% ROI in the first quarter
- Collaborated with cross-functional teams to revise existing policies, resulting in a 20% decrease in employee turnover and significantly improving overall workplace satisfaction ratings
- Led a strategic planning initiative that resulted in a 25% increase in organizational efficiency, streamlining operations and reducing costs by \$250,000 annually
- Led a cross-functional team in deployment of workflow software, achieving a 40% increase in task completion rates and enhancing interdepartmental communication, which improved project efficiency by 35%

Independent Consultant / Sabbatical

- Took an intentional pause from a 14-year executive career to take a self-designed sabbatical to rejuvenate myself and discover opportunities to use my skill set in new ways
- Conducted 30+ informational interviews to understand industries and my career options
- Completed Google Project Management Certification
- Used time to complete overdue long-held dreams of building a house in Europe
- Provided consulting services to 3 startups with guidance on business model development, market positioning, and product/service innovation

Vice President of Business Development

December 2016 – November 2023

Got Coverage Inc. | Fort Worth, Texas

Headed a nationwide general lines insurance brokerage focusing on commercial, personal, life, and health insurance, producing over 1,700 sizeable policies in sixteen states

- Engaged with all levels of professionals to negotiate a 10% cost reduction for clients by contract negotiation of a lowered down payment interest rate, resulting in improved short- and long-term customer service, brokerage relationships and retention
- Devised tailored SOPs for property and casualty insurance branch, collaborating across engineering, sales, and legal teams, minimizing compliance exposure from 33% to 2%, increasing sales by 2.2MM
- Established employee-customer matching rulesets to enhance stakeholder journey by utilizing employees' language and expertise skills, hiking average renewal rate from 69% to 89%
- Spearheaded initiative to hire virtual assistants to automate 90% of customer service and quote processing, resulting in 32% savings in variable cost
- Conducted interviews, leading to a redesigned benefits package and a 77% drop in employee churn
- Instituted brokerage accounting guidelines based on GAAP principles, eliminating erroneous payments to insurance carriers and premium finance companies by 89%
- Scaled firm from focusing on local clients to 16 states nationwide by researching and leveraging synergies in insurance across states, boosting annual revenue by 35% while keeping operational costs below 32%
- Led a cross-functional team to automate quoting process and streamline CRM and ERP workflows, resulting in a 78% sales conversion rate and a 4-day reduction in sales closure time
- Directed development and launch of a new website by lowering number of clicks to get a quote, improving usability, generating more leads, raising sales by 7% in first year of launch
- Constructed and executed a mobile application with engineering team linked to brokerage management software, resulting in risen retention and new cross-selling leads, by 8% in first quarter of launch

Executive Director, Operations

December 2008 – November 2016

JustCountants Inc. | Fort Worth, Texas

Directed operations of a bookkeeping and tax preparation firm servicing small and medium-sized businesses with portfolio of over 2,500 clients

- Originated business strategy to focus on low volume high-value client acquisition to adapt to market trends, pivoting teams to focus on business clients, leading to sizeable ROI on marketing by 84%

- Allied with Internal Revenue Services, decoding tax publications and providing tax notice resolutions, to save \$22M in tax debt for 2,443 clients
- Re-engineered workflows by employing task management software across cross-functional teams to mitigate interdependencies of teams, lowering account processing time by 47%
- Instituted weekly business reviews, quarterly performance reviews, and learning and development budgets, enhancing employee productivity and furthering sales goal achievement to 89%
- Adopted a virtual first approach, invented and commenced a cloud-based client portal to expand into 14 states, soaring customer base from 435 to 2631 in 2 years
- Brokered acquisition of business to an investment group, leading due diligence partnership, to close contract within 30 days, and transitioned company to new management in 3 months, boosting value from 3% to 7%

ADDITIONAL EXPERIENCE

Managing Partner

ExpressTax | Fort Worth, Texas

Regional Operations Manager

Southwest Bank | Fort Worth, Texas

EDUCATION

B.S. Business Administration

TARLETON STATE UNIVERSITY | Fort Worth, TX

Certifications

- Texas Department of Insurance – General Lines, Life, Health (2011)
- Google Project Management Certification (2024)

Languages

- Serbo-Croatian (Native)
- English (Fluent)

References

- Available upon request