

RENATO MILJATOVIC

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SUMMARY

Dynamic Executive Leader with 15+ years of proven success in business intelligence and operations management. Expertise in leveraging data-driven strategies to achieve measurable results, cultivating high-performing teams, and driving innovation through ethical, optimized solutions. Renowned for strategic vision, fostering inclusive collaboration, and delivering operational excellence to attain sustainable growth.

- Strategic Leadership and Vision Alignment
- Financial Strategy and Budget Optimization
- Client Engagement and Relationship Building
- Business Development and Growth Initiatives
- Operational Efficiency and Process Improvement
- Technology Innovation and Integration

PROFESSIONAL EXPERIENCE

President

April 2024 – Present

Kurv Inc. | Crowley, Texas

Headed a nationwide accounting firm with multiple locations and a team of 130 employees concentrating on public, governmental and private accounting.

- Directed and aligned global operations, overseeing 2 international remote teams, a U.S.-based remote team, and 3 brick-and-mortar locations to ensure seamless service delivery to over 3,500 clients nationwide
- Increased net profits by \$575K (12%) within one fiscal year by executing strategic cost optimization initiatives, reducing overhead expenses by 20%, and boosting operational efficiency by 30%
- Collaborated with executive team and executed a 3-year financial strategy, establishing a scalable budget and forecast aligned with organizational growth objectives and revenue predictability
- Redesigned client engagement contracts by implementing a systematic reevaluation process, resulting in a 15% average price increase across 30% of engagements, contributing an additional \$400K in annual revenue without impacting client satisfaction
- Partnered with FinCEN to develop and launch a BOI processing product, diversifying firm's service offerings and establishing a competitive market presence, expanding revenue by \$320K
- Led implementation and transition to advanced customer management software, replacing manual processes, boosting project completion rates by 30% and expanding employee capacity by 17%
- Fostered strategic talent pipelines by liaising with universities and Independent School Districts, securing a 25% growth in high-caliber recruits for long-term organizational success
- Transformed company culture, cultivating cross-functional collaboration, elevating employee engagement scores by 35%, leading to a unified, high-performing workforce
- Spearheaded a brand revitalization campaign, achieving premium online visibility, improving client perceptions, and advancing acquisition rates by 20%.
- Redefined employee time allocation strategies, prioritizing billable hours while maintaining operational efficiency, leading to a 15% increase in revenue-generating activities without disrupting overall workflows

Career Sabbatical

November 2023 – April 2024

- Intentionally paused a 14-year executive career to embark on a self-designed sabbatical, focusing on personal rejuvenation and exploring innovative ways to apply leadership expertise and strategic skills

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, partnering with 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%
- Conducted interviews, leading to a redesigned benefits package and a 77% drop in employee churn
- Scaled firm from centering on local clients to 16 states nationwide by researching and leveraging synergies in insurance across states, lifting annual revenue by 35% while keeping operational costs below 32%
- Led a cross-functional team to automate the quoting process and streamline CRM and ERP workflows, resulting in a 78% sales conversion rate and a 4-day reduction in sales closure time
- Constructed and released 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%
- 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, strengthening value from 3% to 7%

ADDITIONAL EXPERIENCE

Managing Partner and VP Strategic Expansion

ExpressTax | Fort Worth, Texas

Regional Manager, Front-end Operations

Southwest Bank | Fort Worth, Texas

EDUCATION AND CERTIFICATIONS

B.S. Business Administration

TARLETON STATE UNIVERSITY | Fort Worth, TX

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