

MICHAEL AGOSTINO

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B2B AND ENTERPRISE PRODUCT EXECUTIVE

Enterprise product leader driving business impact within medium-sized technology companies and tech-driven industries. Excel at driving transformation with stakeholders and tech teams.

DEMONSTRATED ACHIEVEMENTS

- ✓ Scaled \$100MM fin-tech business by 3x with improved digital experience and customer reach
- ✓ Re-invented \$25MM ad-tech startup with new, sustainable products and business model
- ✓ Re-shaped multiple organizations, improving performance and morale via coaching, process and accountability

SPECIALTIES AND LEADERSHIP SKILLS

- Product Executive and CTO
- EIR & Venture Capitalist
- Digital Transformation
- Business Model Design & Strategy
- Lean & Agile Development
- Organization Development and Coaching

EXECUTIVE EXPERIENCE

INDEPENDENT | SILICON VALLEY 1/2021 – PRESENT

- Founded new fin-tech business delivering all-digital financial planning services for mass affluent clients
- Consultant for wealth management technology industry on trends, landscape and strategy

EDELMAN FINANCIAL ENGINES (fka FINANCIAL ENGINES) | SUNNYVALE 1/2015 – 12/2020
VP, Product Management / Head of Incubation Lab

Product leader for largest RIA and leading financial technology company providing investment advice and automated asset management to 10M clients and \$250B in managed assets.

- Led 20-person product management team responsible for proprietary platform that manages \$200B+ AUM. Platform includes advisor tools (CRM, financial planning), automated trading & investment methodology for large 401(k) plans, digital marketing platform, and recordkeeping partner integration platform.

Key Achievements

- Tripled assets and ARR to \$600MM+ with improved digital engagement & client experience, increased reach
- Led company-wide effort to expand value proposition to include financial planning. Convinced CEO to create new financial planning tool and extend trading platforms resulting in new service of \$3B in AUM.
- Created Salesforce based CRM for 700 field advisors and national contact center. +20% in call capacity.
- Led turnaround of product org. Improved decision making, agility, resourcing, and cross-functional collaboration with engineering and business, recruiting new leaders, resulting in improved velocity by 3X – 5X.
- Drove build of machine learning / AI platform, reversing decline with +30% increase in conversion.
- Created vision and evangelized new API Platform resulting in wins with 4 partners and gathering \$2.1B AUM
- Tapped by CEO and CTO in 2019 to create new Incubation Lab to explore new business models, channels and services for company. Created lab, recruited members, funded and launched first initiative.

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33ACROSS | SUNNYVALE

2012 – 1/2015

CHIEF TECHNOLOGY OFFICER (CTO)

Product, tech and data sci leader for online advertising and publisher technology startup company serving 600k publishers and brand advertisers. Executive in charge of West coast office.

Key Achievements

- Conceived and spearheaded strategy to pivot \$25 MM revenue company from advertiser and agency customer focus to publisher focus while changing sales model and GTM.
- Designed and launched a new class of more effective advertising using big data and machine learning / AI called the Intent Signal Platform that performed 4x to 10x better than ad exchange inventory.
- Led turnaround of 25-person product & technology organization. Improved execution to 90% achievement of KPIs through alignment with business objectives and increasing accountability and transparency.

IDEALAB | PASADENA

2011 – 2012

ENTREPRENEUR IN RESIDENCE (EIR)

Explored entrepreneurial ventures with Idealab founder Bill Gross. Created business plan including market opportunity, technology feasibility, and minimum viable product before joining as founder.

- Founded new online advertising technology company selling to ad networks, ad exchanges, and trading platforms. Raised initial seed funding and recruited beta customers.

SNAP TECHNOLOGIES | PASADENA

2006 – 2011

CHIEF TECHNOLOGY OFFICER (CTO)

Created technology vision for search, online advertising and contextual content startup company backed by Idealab incubator and leading venture capital firm Mayfield.

- Led product development, data science and technical operations org of 35 with \$4MM budget from early revenue to profitability

Key Achievements

- Created Snap LinkAds business line that leveraged inventory from RTB and spend from publisher monetization platforms. Scaled business to reach over 20% of US Internet population every month.
- Created vision for Snap Shots, a widget used by more than 3 million publishers and Snap Shots Ad Network which was named the top niche ad network by comScore.
- Presented tech behind Snap Shots and Snap Search at Apple's WWDC 2007 to audience of 900.

VERITAS SOFTWARE / SYMANTEC CORPORATION | MOUNTAIN VIEW

2005 – 2006

GROUP PRODUCT MANAGER

Led product management for Volume Manager storage software, a \$200MM product line for enterprise data centers. Typical customers include AT&T, Fidelity, Citigroup, and UBS.

Key Achievements

- Recruited enterprises to beta and produced 1.0 release of new SAN volume manager.
- Drove license renewals with presentations to Fortune 100 CIOs and at VERITAS annual conference.

VULCAN CAPITAL / VULCAN VENTURES | SEATTLE

1998 – 2004

VENTURE CAPITALIST

Managed and invested the technology-oriented venture capital portfolio of Paul Allen, co-founder of Microsoft.

- Oversaw software portion of venture and public portfolio focusing on Internet infrastructure and e-business.

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- Prepared and presented analyses to Paul Allen on range of technology, financial and industry topics.

Key Achievements

- Deployed over \$25MM in 8 venture capital investments, returning over 500% in profit.
- Appointed by Mr. Allen as the GM for FlipStart project which was pocket-size computer (world's smallest) running Windows. Developed business plan, drove BD with OEMs and ODMs before returning to VC.
- Developed investment case to buy \$15MM wireless spectrum in lower 700 MHz FCC auction. Led auction strategy and execution. Asset sold to AT&T in 2009 for nearly \$200MM.
- Served on 4 boards of directors as director or observer, including public company CyberSource, a e-commerce payment company.

INFOSEEK CORPORATION | SUNNYVALE

1995 – 1998

MANAGER, ARACHNOLOGY & CONTENT PRODUCTS / SENIOR SOFTWARE ENGINEER

Key Achievements

- Co-creator of award-winning Infoseek search engine used by millions of daily users from 1996 to 2001, contributing 50% of revenue.
- Created 10 different content products for Infoseek / Disney portal including sports, news, money (finance), and personalized home page.

EARLIER EXPERIENCE

EMERGING TECHNOLOGY AND STARTUP COMPANIES | SILICON VALLEY

1990 – 1995

VARIOUS DEVELOPMENT ROLES

- Kaleida Labs – Developed cross-platform multimedia authoring and playback platform that enabled “write once, run-anywhere”. Technology folded back into Apple, one of the founding partners.
- GO / Eo – Developed features for PenPoint, a custom operating system for PDAs (formats like tablets and smart phones). Led cross-company effort to reduce operating system size by 50% to achieve hardware partners cost objectives. AT&T licensed technology to produce EO 440, the first high volume mobile tablet computer, and eventually acquired control of the company.
- Xerox PARC / XSoft - Worked with PARC researchers on new operating system features. Sole developer responsible for CEDAR/MESA compiler used by Xerox software engineers worldwide.

EDUCATION AND CREDENTIALS

CALIFORNIA POLYTECHNIC STATE UNIVERSITY, SAN LUIS OBISPO (“CAL POLY”)

BACHELOR OF SCIENCE, COMPUTER SCIENCE - GRADUATED MAGNA CUM LAUDE

COLLEGE FOR FINANCIAL PLANNING

CHARTERED RETIREMENT PLANNING COUNSELOR (CRPC)