

# Katherine A. Curiel

## SUMMARY

Dedicated and strategic leader with a proven track record in project management, stakeholder engagement, and data analysis. Successfully led end-to-end delivery of high-impact projects, including tech partnership integrations and new product launches, resulting in substantial revenue growth.

## AREAS OF EXPERTISE

- Strategic Planning & Execution
- Go-to-Market Strategy
- Stakeholder Engagement
- Team Leadership & Mentorship
- Market Research
- Financial Modeling & Forecasting
- Data Analytics & Storytelling
- Data Visualization
- B2B Deal Negotiations

## SELECTED ACHIEVEMENTS

- Launched largest partnership in company history generating \$200M+ in origination volume in the first year.
- Led cross-functional team of 10+ stakeholders to enter first successful new market, generated \$10M in origination in first year.
- Built detailed insights of KPIs needed to underwrite \$1.5B in annual origination volume in collaboration with executives.

## EDUCATION

Master in Business Administration, 2018 – **MIT Sloan School of Management**, Cambridge, MA  
Master in Urban Planning, 2017 – **Harvard University Graduate School of Design**, Cambridge, MA  
Bachelor of Science (Honors) in Finance (Cum Laude), 2012 – **Marquette University**, Milwaukee, WI

## PROFESSIONAL EXPERIENCE

### **Octane – New York, NY**

*Senior Director of Strategy & Analytics* – Jul 2023 - Present

Manage end-to-end delivery of key analytical projects that drive decision-making to achieve operational and strategic goals.

- Conduct go/no-go analysis and ROI models for high-profile, cross-functional projects, such as tech integrations with third parties and new products launches, ensuring each project meets a minimum threshold of \$10M originations.
- Provide monthly performance analysis and market insights to the C-Suite and recommend changes to our risk model and sales strategy to achieve OKR metrics.
- Lead OKR development and tracking across Sales & Marketing business units, providing insights leading to greater customer activation and retention and origination volume.
- Collaborated with department heads to build a detailed 2024 plan to achieve \$1.5B in originations, 50% YoY increase, and return to profitability.

*Director of Strategic Partnerships* – Jan 2020 - Jul 2023

Led a dynamic team of 3 members overseeing 35 partner accounts, \$600M+ in annual origination volume through implementation of promotional rate programs and strategic initiatives. Played integral role in crafting and delivering Quarterly Business Review (QBR) presentations for our top five partner accounts.

- Achieved 4X expansion of partner business within three years by acquiring 15 strategic partners and introducing new programs within the existing partner network, contributing to significant increase in origination volume.
- Launched the largest partnership to-date, accounting for \$200M in originations, by developing a comprehensive pitch

strategy, negotiating competitive pricing structure, and executing go-to-market efforts with a focus on data-driven decision making.

- Secured additional annual revenue of \$2.4M by leading successful repricing negotiation with second largest partner, resulting in \$250M originations annually. Demonstrated keen understanding of market dynamics and financial impact.
- Drove \$50M+ in originations by steering the launch of five cross-functional initiatives by collaborating with the Product, Risk, and Operations teams to enter new industries and enhance offerings. Applied strategic insights and data-driven approaches to optimize market penetration.

### **Yard Ventures – New York, NY**

*Venture Fellows* – Jan 2021 - Jan 2022

Joined a cohort of 10 other fellows to source, analyze and close investment deals over the course of 12 months.

- Led the investment of \$500k in a cutting-edge quantum computing startup, showcasing proficiency in due diligence. Conducted comprehensive financial analysis, market research, expert interviews, and competitive analysis to inform investment decisions.

### **Microsoft – Bellevue, WA**

*Program Manager* – Sep 2018 - Oct 2019

Oversaw Go-to-Market (GTM) teams for highly anticipated cloud products, managing all pricing and value proposition positioning.

- Developed and presented innovative business models for cloud products, incorporating pricing models, market interviews, and strategy testing with a select cohort of Fortune 100 customers. Launched the first Azure dedicated host product in partnership with 15 stakeholders across several departments.
- Successfully pitched and implemented a strategic transition from legacy licensing to subscription-based pricing for the remaining Microsoft legacy products.

### **Omidyar Network – Redwood City, CA**

*Summer Investment Associate* – Jun 2017 - Aug 2017

Supported an investment team of 2 Partners by completing detailed financial analysis and developing investment thesis for new verticals to expand the pipeline of investment opportunities.

- Secured a \$3M investment through negotiation skills, reference calls, valuation analysis, and investment memo writing.
- Formulated an effective investment thesis for a new sector, incorporating expert interviews, pipeline development, and alignment of team's theory of change with industry's fit.
- Established a new system to monitor financial and social impact KPIs for tracking the success of portfolio companies.

### **Ambri Inc. – Cambridge, MA**

*Corporate Development Associate* – May 2016 - Dec 2016

- Facilitated fundraising efforts and board meetings by leading market research and competitor analysis.
- Generated \$50M through creation of pitch deck, development of investor targets, and revamp of value proposition and market messaging in collaboration with executive team for Series D.

### **Wells Capital Management – Milwaukee, MI**

*Fixed Income Analyst* – Jun 2012 - Aug 2014

- Coordinated investments worth \$250M+ across 15 investments through the introduction of financial models and evaluation of deals' credit worthiness.
- Maintained keen oversight of credit standing of 30+ portfolio holdings across more than 10 mutual funds with a total of \$330M AUM.
- Innovated and implemented credit repayment models, enabling portfolio managers in restructuring through estimation of potential losses during default events.

## **TECHNICAL PROFICIENCIES & CERTIFICATIONS**

### **Languages: Tools:**

#### **Certifications:**

SQL (advanced), Python (beginner)

Tableau, Capital IQ, Bloomberg, Adobe

Illustrator and InDesign Completed CFA

Level I & II Examinations