



JORDAN C. KLEINSMITH

734.834.8002

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SKILLS

- Proven leader
- Well-informed technologist spanning numerous platforms
- Highly-rated presenter with executive presence
- Ability to communicate technical subjects to non-technical audiences
- Masterful troubleshooter and problem solver
- Adept at deriving clear requirements from observed customer behavior and requests
- Experienced with the design and execution of successful marketing campaigns, including numerous successful video/social projects
- Effective and efficient researcher using a variety of methods
- Quick learner with an ability to self-teach
- Extremely detail-oriented and an excellent writer

JORDAN

With a cross-functional background and strategic mindset, Jordan Kleinsmith is a *Pragmatic Institute* certified (PMC-IV) Product Manager with extensive experience in both the B2B software and professional tax & accounting services markets.

EXPERIENCE

Principal Product Manager — Liscio, Inc (Liscio.me)

Full-Time Remote — January 2024 to Present

Responsible for building Liscio's line of tax automation features for tax professionals.

- Designed and built an extensive taxonomy for tax form and tax data classification
- Successfully designed, built, and delivered Smart Delivery for 1040 returns in 5 months

Senior Manager — Tax Technology, Marcum LLP

Full-Time Remote — May 2022 to June 2023

Oversaw the ongoing transformation of the Tax Technology used at Marcum LLP, including through the building of new technology in-house to transform the tax practitioner's workflow.

- Successfully transitioned Development and Analyst teams to using Azure DevOps
- Designed new ROI accounting system for assessing and executing projects
- Launched and managed first Tax Technology Intern program

Director of Product Mgmt. — Advisory, Thomson Reuters

Ann Arbor, MI / Nearby Home Office — July 2020 to January 2022

Responsible for a portfolio of both desktop and web-based tax planning and advisory products.

- Onboarded a new development team and product owners and shipped a new alpha product within a month, followed by a functional customer beta within three months.
- Achieved a run rate in excess of \$1.1 million for new SaaS product in under two years

Director of Innovation, Thomson Reuters

Dexter, MI / Ann Arbor, MI — January 2018 to July 2020

Manager of ongoing innovation projects and TR's face of innovation to the profession.

- Coached two teams through the process of securing funding (\$100,000 each) for innovation projects, also acting as Product Owner and UX Designer for one project
- Named to the *CPA Practice Advisor's* "20 Under 40 Superstars" list of those most impacting the tax & accounting profession nationally among vendors (2018)

Senior Product Manager — Tax & Innovation, Thomson Reuters

Dexter, MI / Ann Arbor, MI — April 2012 to January 2018

Developed market research and go-to-market strategy for TR's portfolio of tax products.

- Designed comprehensive new commercial policy for the business' primary product line
- Named to the *CPA Practice Advisor's* "40 Under 40" list of those most impacting the tax & accounting profession nationally (2013)
- Founded and managed two customer advisory boards

Account Representative, Thomson Reuters

Dexter, MI — March 2011 to April 2012

Senior Support Representative, Thomson Reuters

Ann Arbor, MI — October 2006 to March 2011

EDUCATION

Hillsdale College

B.A., History, 2002-2006

Graduated *cum laude* with a 3.5 GPA, a French minor, and a well-rounded liberal arts education.

REFERENCES Available upon request.