

Dave Bettner

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Enterprise SaaS and financial-reporting professional with 12+ years leading implementation, integration, and customer delivery. Workiva PS → Solutions Architect → CPA-firm practice lead → governmental ACFR delivery. Scopes adoption with tight pilots, confirm-before-write controls, and readback verification on live regulated reporting workbooks.

EXPERIENCE

Senior Manager

LSL, LLP · Oct 2025 – Present

- Lead delivery on governmental ACFR: reporting architecture (TB → statements → footnotes), client training, and production cutover.
- Piloted agent-assisted workbook sweeps with journaled changesets and tie-out verification before sign-off.
- Executive readouts on remediation scope, controls, and status with client finance leadership.

Manager - Digital Services

Citrin Cooperman · Dec 2024 – Oct 2025

- Managed five-person Workiva implementation team at a Top 100 CPA firm.
- Delivered finance and regulatory reporting implementations across close, review, and controls workflows.
- Kaiser Permanente certification workflow: scoped bidirectional API integration to internal archival system through production handoff.

Solutions Architect

Workiva · Sep 2022 – Sep 2024

- Technical discovery and architecture reviews for enterprise accounts; scoped ERP/GL → Workiva integrations and resolved API blockers for SEC, IFRS, XBRL, SOX, and audit reporting.
- Built integration checklists, training handoffs, and expansion playbooks; translated account pain into product feedback for Engineering.
- Supported 6–12 concurrent enterprise accounts across regulated reporting and close workflows.

Professional Services Consultant

Ambra Health · Aug 2021 – Sep 2022

- Healthcare imaging startup; continued through acquisition by Intelrad Medical Systems.
- Customer-facing implementation: discovery, configuration, integration troubleshooting through go-live in a regulated SaaS environment.

Professional Services Manager

Workiva · May 2017 – Jul 2021

- Led implementations kickoff through production: requirements, platform configuration, GAAP/IFRS/XBRL setup, end-user training, and expansion demos with Sales.

Financial Reporting Manager

Workiva · Sep 2015 – May 2017

- SEC reporting, XBRL tagging, 10-K/10-Q filings, and quarterly financial statement preparation with controllers and external auditors.

SELECTED TECHNICAL PROJECTS

- **Workiva MCP Server** — Authenticated API integration so AI workflows read and update Workiva spreadsheets; document linking, data refreshes, exports, and async job polling on live government financial reports (35+ sheets).
- **Agent-assisted reporting workflow** — Inspect → propose → apply → verify on regulated workbooks with scoped credentials and readback checks.
- **Wingman** (github.com/dbett4/wingman) — Spreadsheet defect detection with approve-then-apply readback; adoption pattern teams could run independently after one live walkthrough.

EDUCATION & SKILLS

M.Acc. · B.A., Accounting — Iowa State University

Workiva Certified Delivery Engineer · Configuration Specialist · Data Management Suite · Cursor · Python · REST/OAuth APIs · ERP/GL integrations · SOX/GRC · governmental ACFR · XBRL