

Digital Transformation and Product Leader

Strategically-oriented and innovative leader with a solid history of championing data-driven solutions to promote efficient operations, processes, and systems.

Proven track record of managing geographically dispersed, cross-functional teams through project deployments that enhance sales and revenue streams. Offer comprehensive recommendations to drive competitive advantage, position organization for future-state goals, and comply with domestic and international operating regulations. Influential and collaborative leader; able to foster relationships across all levels of leadership, key stakeholders, and external industry leaders. Remain abreast of current and emerging information, technology, and industry trends.

AREAS OF EXPERTISE

- Global Strategic Management
- Business & Financial Planning
- Business Architecture
- Project Management
- Vendor Management
- Business Intelligence
- Innovative Processes/Systems
- Technology Plans & Roadmaps
- Data Strategy / Transformation

ACCOMPLISHMENTS

-
- Regarded as Technology and Innovative Subject Matter Expert; partner across major business lines and operating functions to deliver scalable, top of the line business solutions.
 - Introduced and matured Scaled Agile Framework and Business Capability & Architecture at General Motors and Schwab Bank.
 - Implemented Modernized Advanced Lending Servicing Solutions at Schwab Bank.
 - Champion strategic decision-making by demonstrating importance of continuous improvement through business intelligence analysis, return on investment evaluations, and customer experience enhancements.
 - Frequently recognized for exceptional contributions to ongoing innovation, championing diversity, and excellence of leadership; GBS Leadership Excellence Award, two-time Chairman's Award Recipient (Global Profitability & Online Information Services), two-time Walk the Talk Diversity Award, President's Award (Global Data Warehouse & Reporting), Valuing Diversity Award, Innovation Award for Line Item Detail Delivery.

PROFESSIONAL EXPERIENCE

FIS Information & Technology Services, Arizona

06/2024– Present

VP, Head of Data & Analytics, Chief Digital Transformation Office

Head of Internal Capabilities within Customer Experience - Business Transformation. Responsible for ensuring the tools and capabilities such Project Management, CRM, Implementation Workflow Management are designed, build and utilized to meet the needs of the users. Leads future forward initiatives by ensuring changes in market and business priorities including integration needs and technology advancements are reflected.

Amerant Bank, Miami FL
VP, Head of Data & Analytics, Chief Digital Transformation Office

04/2023– Present

Established an enterprise data strategy supporting a broad range of data strategic initiatives and projects to drive alignment with the GM strategy. Architected a business value driven product roadmap while achieving platform operational excellence and optimizing business value by leveraging data assets internally and externally.

- Led the successful Core Processing migration for the BI Data Marts and Power BI Analytical Reporting
- Spearheaded sales enablement and cross sell digital data driven initiatives.
- Instituted Holistic Household Salesforce.com enablement to grow revenue and deposits.
- As Enterprise Data Governance Champion re-designed the council, program and objectives.
- Introduced new tools to enable self-discovery, governance and reporting (Data Catalog, Tableau, CRMA).

General Motors, Detroit, MI
Executive, Chief Data Strategist – Chief Data & Analytics Office

11/2021 – 12/2022

Established an enterprise data strategy supporting a broad range of data strategic initiatives and projects to drive alignment with the GM strategy. Architected a business value driven product roadmap while achieving platform operational excellence and optimizing business value by leveraging data assets internally and externally.

- Served as Vehicle Originated Chief Business Owner, Product and Program Management.
- Executed an Enterprise Data Layer Strategy along with Microsoft Azure Energy proof of concept and EVGro Program Taskforce, Strategy & Innovation Data Insights and Scaled Agile and Portfolio Management.
- Optimized Market and Competitive Intelligence capabilities
- Led Risk Management and coordination of risk mitigation in partnership with Legal, IT, Privacy, etc.
- Executive Sponsor for Data Analytics Steering Committee with Senior Leadership Team.

Charles Schwab Bank, Phoenix, AZ
Managing Director – Bank Platforms, Business Process Efficiency & Data Governance

9/2019 – 11/2021

Execute banking platform, data governance, business intelligence, reporting, and process efficiency vision and strategy. Hold sphere of influence comprised of Product Management, Business Analysts, and Solutions Architects supporting banking systems and platforms. Manage enterprise IT Investment portfolio valued at \$10M; serve as Agile Delivery Owner over major Digital and Data projects. Drive implementation of next generation banking platforms and digital solutions to meet current and future IT needs. Manage cross-functional project teams through completion and seamless integration of high-visibility, high impact initiatives. Build strategic alliances across key stakeholders and internal business lines.

- Serve as Bank Technology Business Owner, Bank Data Owner, and Head of Banking Trust Services (BTS) Data Governance Program.
- Executive Sponsor overseeing implementation of enterprise-wide Advanced Lending Solutions platform for Personal and Equity Loans business line.
- Conceive and launch digital solutions spanning mobile, alerts, and person-to-person payments.
- Promote continuous regulatory compliance amongst vendors and throughout technology implementations; verify regulatory reports and represent Bank at regulatory meetings.
- Hold accountability over introducing new BTS IT Investment Prioritization Process to create alignment between corporate strategic goals and investments.
- Manage vendor-provided solutions; negotiate contracts and confirm performance adheres to contract.

American Express, Phoenix, AZ
Director, Global Commercial Payments (GCP) Sales Field Tools & Incentive Compensation (3/2015 – 9/2019)

12/2012 – 9/2019

Promoted to executive role charged with managing strategic growth of internal data, reporting capabilities, and intelligence-based tools for GCP business line. Managed \$10MM project portfolio. Closely collaborated with GCP stakeholders and internal teams to conceive, design, and deploy overall data solutions architecture, including best-

in-class business intelligence tools. Drove utilization of metrics and analytics to position business line for further growth.

- Oversaw deployment of global sales platform to enhance business unit productivity and streamline daily operations; 80% reduction in time calculations, reduced Sales & AD information request calls by 25%, and 40% delivery acceleration.
- Implemented cloud-based IBM Incentive Management Solution across US and Canadian locations.
- Positioned as Chief Product Owner for Strategic Analytics Global Environment and Incentive Compensation Management.

Director of Compliance, Third Party Lifecycle Management (TLM) (12/2012 – 2/2015)

Brought onboard to serve as the designated Business Unit Liaison for Enterprise Growth, GMS, GNS, ICSS, Digital Partnerships, GBS, and Technologies. Established TLM Change Management and Innovation Teams to enhance business unit support, while ensuring continuous enterprise compliance. Conducted expert-level risk assessment and due diligence. Presented key recommendations to resolve gaps in reporting and regulatory compliance.

- Spearheaded implementation of comprehensive third party lifecycle management processes and corresponding tools.
- Influential contributor towards consolidation of 10 AEMP Third Party Management global policies, risk memorandums, and escalation procedures to create unified standard operating procedures.

American Express, Phoenix, AZ

9/2009 – 8/2012

Director Strategic Marketing Capabilities - US Consumer Card Group - Technologies

Served in multifaceted role as Premium Partner Management Office Relationship Leader and Relationship Owner for multiple business lines, including Card Services & Insurance, New Partnerships, and Open Small Business Services Technology. Held significant strategic, financial, and operational accountability. Managed \$1.9B operating budget and spend strategy. Oversaw geographically dispersed team responsible for US Consumer domains spanning AXPI, Membership Rewards, and Merchant Services. Set standardized processes and enterprise tools.

EDUCATION

Master in Global Management and Information Systems Management

University of Phoenix • Tempe, AZ

Leading Motivation and Developing Trust in Global Teams Executive Program

Arizona State University, Thunderbird School of Global Management • Glendale, AZ

Bachelor of Science in Computer Information Systems

Arizona State University • Tempe, AZ

LICENSES & CERTIFICATIONS

Chief Data Officer Certificate

Carnegie Mellon University, Executive Education, October 2022

Scaled Agile Framework Certification

Scaled Agile, January 2020

Certified Business Architect

Business Architect Guild, 2019

Certified Project Management Professional (PMP)

Project Management Institute, 2005

PATENTS & INNOVATION

American Express Travel Related Services, New York, NY – **Awarded Patent (7,881,997)** for Global MIS Benchmarking “system and method for quantitative peer travel and expense benchmarking analysis.” (2011)

American Express, New York, NY – **Awarded Patent (7,647,257)** for Global Data Warehousing – System and Method for Web Access to Financial Data (2010)

American Express, New York, NY – **Patent Pending** for Supplier Risk/Management On-Line Toolkit (2010) and conversion routines (2005)

AFFILIATIONS

Mindfulness First Board member, August 2022 - Present

Business Architecture Guild – Global Member, January 2019 – Present

American Diabetes Board of Directors – Phoenix, Member, January 2019 - Present

American Diabetes Tour de Cure, Chairman, December 2015 – August 2019