

Product design leader with 25+ years creating enterprise software that's simple *and* powerful.

- Built and led design teams at 3 companies (FastChannel, McKesson, Pega). Defined the strategy, hired resources, and introduced supporting processes. Total of 10 years as head of a team lead. Also experienced working through external agencies.
- Leading a lean project at NYL to redesign and modernize an aged Salesforce CRM. Built an AI framework that uses a single source of truth to generate interactive prototypes, design specs, field definitions, epics, and user stories. It enables one person cover all design and requirements role, where a comparable program at the same company staffed six.
- Developed design systems that make best practice the path of least resistance rather than an enforced standard. The Pega UI Gallery samples doubled as production-ready templates already optimized for usability, accessibility, performance, and localization.

New York Life Vice President, Product Design

2018–Present

- Serving as UX Lead, Product Owner, and Business Analyst for Salesforce Evolution, a modernization of a 10-year-old CRM used by 12,000 advisors, leveraging a self-designed end-to-end AI-driven workflow.
- Directed UX design and delivery for GuideMe, a product that guides new agents through appointments while the client sees the screen, through a ~20-person external design agency.
- Architected the Conversation Orchestration framework for authoring guided conversations without engineering involvement. Invested ~1.5x the effort of a bespoke approach to deliver 30x long-term value.

Periodic Review was the initial workflow designed for experienced agents working with existing clients. Rather than build a separate experience, a Conversation tailored the navigation and messaging to discussing an existing portfolio. The same framework produced two bonus Conversations for scripts that advisors were previously expected to remember and navigate themselves. In the following release, an alternate selling approach was launched as a Conversation without needing to change the existing navigation.

- Designed the Nurture List from scratch, turning fragmented agent outreach into a flexible daily workflow. Conducted field interviews and evaluated multiple design directions with stakeholders. Hired and managed a senior designer to own the Nurture List design and work on other projects.

Everything under the covers reused existing product records and components, delivering a new capability without adding technical debt. A high-risk failure point for new agents is freezing when facing an empty list with no clear next actions. The Suggestions area addresses this directly, surfacing curated lead sets and creating a closed loop where today's contacts inform tomorrow's recommendations.

Consultant—Product & UX Strategy Multiple Enterprise Clients

2012–2018

- Contracted by State Farm (through DDB New York) for a 1-month assessment of an underperforming design function that turned into a long-term engagement.

After delivering recommendations focused on consolidating roles and changing hiring criteria, the role extended into a multi-year partnership delivering hands-on UX, product, and design work on insurance products, operating independently of the existing team structure.

- Served as a Product Manager on Ericsson's build-from-scratch, next-generation SaaS billing platform for telecom. As Product Owner for Metadata Authoring, turned a team of new hires into the project's highest-velocity Scrum team.
- Engaged by CRICO, a medical insurer preparing to hand-code UIs that Pega had recently begun supporting natively. Having been UX and PM for the enhancements at Pega, identified the gap and

redirected the project, compressing an estimated 3-year timeline into about 9 months by leveraging new out-of-the-box capabilities.

Pega / Pegasystems Director, Product Management—UI Architecture & Design

2007–2012

- Hired as the company's first UX resource, set a design strategy for the platform, created and managed a 3–5 member UX team, and delivered a design system for a platform used by Fortune 100 companies to build mission-critical business applications for hundreds of thousands of users.
- Conceived and delivered a new generation of UI components and capabilities, including page layout, form field layout, component library, rich grids and trees, branding, and a unified event framework. In the case of data grids, increased functionality and improved performance by replacing a custom-coded component that took 18 months to implement.
Layered pre-packaged, no-code configurations on top of the same underlying primitives, so a non-technical user could confidently select a common pattern from a dropdown. Then, as needed, drop a level deeper into full configuration. Advanced functionality from simple configuration.
- Acted as Lead Designer and PM/PO for 3 UI Scrum teams, delivering features that helped turn an area that lagged the market by several years into a competitive advantage and significantly decreased UI design and development time.
- Conceived, designed, and built the UI Gallery, a design system that put demonstration over explanation and made best practices the path of least resistance rather than an enforced standard. All samples were also production-ready templates to kickstart development. Adopted by Sales to demonstrate product capabilities and make rapid POCs into a market advantage.
- Owned accessibility and localization for a platform that used metadata to generate screens on demand rather than shipping a finite set of pages to check for issues. Compliance was achieved by capturing the requisite metadata and updating the run-time generation engine logic such that compliance was implicit.

Earlier Design Leadership Roles

1997–2007

- **McKesson** (2006–2007)—First UX hire embedded within the Systems Architecture group for a multi-year healthcare platform to build market share and replace products used by hundreds of customers. Built and led the design team, including creation of a design system and technology selection for the platform's shared component library. Produced a 200+ page interactive EHR prototype for providers.
- **FastChannel Networks** (2002–2006)—First UX hire and solo designer for a multi-application nationwide video distribution network used by advertising agencies, video production facilities, and 3,000+ television stations. Went on to build and lead a team of 4 designers in simultaneously delivering 3 from-scratch enterprise applications.
Took sole ownership of a stalled product refresh by filling every role but development, including product management, project management, UI design, HTML/CSS, QA, technical writing, and marketing. Shipped in 5 weeks, reversing a declining subscription renewal rate worth \$1M+ in annual revenue.
- **Xchange** (1997–2001)—Climbed from technical writer to UI Lead coordinating the efforts of a dozen designers. Lead designer for a then-bleeding-edge desktop-to-browser evolution of the company's flagship product. Also shipped a 150+ page application for 3,000+ bank branches in UK and US.

Education

B.A., HISTORY | Emory University

CERTIFIED SCRUM PRODUCT OWNER (CSPO)