

Senior Manager

Versatile and results-driven Senior Manager with expertise in Artificial Intelligence (AI) learning & engagement, design thinking, agile transformation, and fostering innovation culture

Skilled in leading and mentoring cross-functional teams, driving adoption of AI literacy, and facilitating change management for large-scale initiatives. Committed to shaping product roadmaps, establishing highly demanded features, and accelerating progress toward defined goals. Adept in conducting market research, gathering/translating customer needs, and ensuring compliance with regulatory requirements. Technically proficient in MS Office Suite, including Word, Excel, and PowerPoint.

Areas of Expertise

- Artificial Intelligence Training
- Content Creation
- Data-Driven Decision Making
- Agile Product Management
- Financial Services
- Change Management
- Client Advocacy
- Training & Mentoring
- Customer Satisfaction

Career Experience

Health Care Service Corporation, Chicago, IL

January 2024 – Present

Senior Manager – Business Excellence – Data & Analytics

Leads an enterprise-wide initiative to bring ‘AI Everywhere’, through promotion of AI literacy across the organization, training executives, and training our governance committees to uncover value responsibly through the use of AI. Fosters a culture of continuous learning to attract and retain top talent and drive innovation at every level.

- Launching an organization-wide effort to cultivate AI literacy among 27K employees through targeted training, strategic change management, and impactful communications.
- Leading the Business Excellence team responsible for the Data & Analytics Learning program, proactively driving engagement, fostering a dynamic learning culture, and facilitating seamless collaboration across diverse teams.
- Promotes positive change and career growth opportunities as a member of the Women in Data Leadership team

TD Ameritrade – And Subsidiaries Acquired by Charles Schwab (April 2014 – July 2023)

Charles Schwab, Chicago, IL

March 2021 – July 2023

Senior Manager – Innovation Strategy & Culture

Fostered innovation environment by offering sponsorship support, empowering change champions, and implementing internal training programs. Disseminated latest trends in innovation to leadership by conducting research and delivering presentations that included actionable recommendations for incorporating trends into strategies by using design thinking principles. Advocated for client needs by proactively driving new projects and product implementations through experimentation and user interviews.

- Spearheaded transformative innovation cultural change during major acquisition affecting 30K employees.
- Ensured alignment of solutions with customer expectations, resulting in increased client satisfaction and revenue growth.

Discotech – TD Ameritrade Start Up Incubator, Chicago, IL

April 2019 – March 2021

Co-Founder – Start Up Companies

Established innovative start-up companies with focus on family financial planning and gamified financial vehicles for sports enthusiasts, contributing to diversification of financial services in market. Assessed and validated customer needs through rigorous experimentation, in-depth research, and product testing.

- Met specific requirements and preferences of target audiences by ensuring delivery of tailored solutions.

TD Ameritrade, Omaha, NE

Sep 2017 – April 2019

Senior Analyst – Agile Transformation Office

Orchestrated enterprise-wide rollout of agile transformation initiatives. Oversaw end-to-end project implementation and change management processes to ensure efficient integration of transformation initiatives. Analyzed effectiveness and impact of transformation by conducting adoption analysis.

- Ensured stakeholder satisfaction by evaluating requirements and strategically selecting enterprise agile planning tool.

TD Ameritrade, Omaha, NE

June 2015 – Sep 2017

Rotational Analyst – Compliance & Technology

Managed electronic communication compliance while ensuring adherence to regulatory requirements. Facilitated informed decision-making by delivering data visualizations to senior leadership and suggesting actionable insights.

- Improved company-wide engagement by developing compliance trainings in virtual reality, enhancing learning experience, and ensuring immersive approach to compliance education.
- Introduced new time allocation process for project managers, optimizing resource utilization and project efficiency.

TD Ameritrade, Omaha, NE

Feb 2015 – April 2015

Investor Services Intern

Ensured seamless and positive client experience by directing client inquiries to essential resources. Resolved clientele issues by connecting customers with appropriate information and personnel.

- Promoted delivery of best-in-class client support by designing computer training modules that enhanced skills and knowledge of frontline representatives.

Additional Experience

Technology Corporate Risk Intern, TD Ameritrade, Omaha, NE (April 2014—December 2014)

Marketing & Operations Management, Apple iJay, Omaha, NE (Sep 2014 – May 2015)

Programming Coordinator, Creighton University, Omaha, NE (Feb 2013 – April 2014)

Marketing Intern, State Farm, Omaha, NE (May 2013 – Oct 2013)

Education

Bachelor Of Science in Business Administration, Creighton University, Omaha, NE

- Major: Marketing with a specialization in Strategic Communications
- Major: Business Intelligence & Analytics (BIA) with a concentration in Technology

Certifications

Diploma in Change Management, Alison (Nov 2023)

Certified Agile Product Manager, SAFe (Dec 2020 – April 2024)

Certified Scrum Master, Scrum Alliance (Aug 2018 – April 2025)