

EXECUTIVE SUMMARY

A senior agile business analyst/product owner with 17 years of experience in enterprise IT services for the healthcare, financial services, manufacturing, and technology industries. An adaptable, personable, and creative professional with the ability to align technological progress and long-term value creation.

FUNCTIONAL EXPERTISE

- Agile Requirements Definition and Management
- UX Interviews and Engaging Across Functions
- Owning Technical Products (Agile/Scrum)
- Testing and Root Cause Analysis/Diagnosis
- Analyzing Data and Making it Visible
- Strategic Consulting and Decision Support

FUNCTIONAL EXPERTISE DEMONSTRATED

[EAZL INC.](#) (NASDAQ: [EAZL](#))

June 2008 – Present

The global software services firm with ~1,500 employees, ~\$300m in annual revenues, and a wide range of clients in the healthcare and financial services industries like Eazl Mutual, Eazl Pharmacy, and Eazl University.

Senior Business Analyst

Performs senior project management and consulting roles for large (\$10mm - \$100m) IT projects.

- **Agile Requirements Definition and Management:** Develops, documents, and manages requirements for large IT projects. E.g. used agile management processes on a 30-person team to roll out a digital life insurance application app sold by [iEazl](#) that supported desktop and multiple mobile operating systems in 2013-2014.
- **UX Interviews and Engaging Across Functions:** Performs complex technical analyses and translates findings into actions. E.g. Advised [Eazl](#) on compliance and data issues when new transparency laws went into effect in 2016 by engaging industry associations like [Eazl.gov](#) and business leaders at firms like Eazl Investments.
- **Owning Technical Products (Agile/Scrum):** Serves as product owner in an agile development environment. E.g. acted as ScrumMaster for the rollout of a Customer Self Service Portal (CSSP) for [Eazl Mutual](#) in 2015/16, facilitating stand-ups, tracking user stories/tasks in [EazlOne](#), coordinating Sprint planning sessions, etc.
- **Analyzing Data and Making it Visible:** Translates technical and UX interview data and business needs into information that can be shared with stakeholders across functions. E.g. Gathered requirements and then designed data maps, wireframes, and sample screens for the Eazl Life Project for Eazl Mutual in 2010.
- **Strategic Consulting and Decision Support:** Regularly delivers technical recommendations to leaders on data element, compliance, user experience (UX), and similar issues. E.g. Developed industry best practices, created thought leadership pieces, and advised select business leaders on new insurance data regulations in 2016.

[EAZL SERVICES INC.](#)

June 2007 – June 2008

An IT process consulting, training, and solutions design firm with ~50 employees specializing in finance, HR, and IT systems and clients like Apple, Google, Eazl, and Progressive Insurance.

Senior Business Analyst

Developed technical processes for internal IT project management organizations (PMOs) for enterprise clients.

- **Agile Requirements Definition and Management:** Led end-to-end technical consulting engagements for enterprise clients building internal software development and IT project management capabilities. E.g. served as business analyst during [Eazl](#)'s initiative to equip field technicians with early-stage IoT technologies.

- **Strategic Consulting and Decision Support:** Owned business analysis process development and training program design for clients integrating new software products, e-learning systems, and digital compliance/cyber security systems. E.g. Gathered requirements, developed, and rolled out a technical project management training program for [Eazl](#)'s project management organization (PMO) in 2008.

Previous work experience:

IT Business Analyst—Various Contract Roles (April 2000 – June 2007)

EDUCATION AND PROFESSIONAL DEVELOPMENT

Bachelor of Arts (History) *Summa Cum Laude*. [University of Eazl](#) (San Francisco, CA)

Certified ScrumMaster® (CSM). [Scrum Alliance Inc.](#)

COMPUTER SKILLS

Agile Scrum Project Management Tools: Jira, Rally, VersionOne

Database Management Systems (DBMSs): Access, Oracle Queries

Document and File Generation Tools: xPression, XML, SQL, Flat Files

eApps: iPipelines iGO

IBM Tools: Rational ClearCase and ClearQuest

Microsoft Office Programs: Visio, Word, Excel, Outlook, PowerPoint, Access, Project

Prototyping/Wireframing Tools: FrontPage, Axure

Data Repository Tools: SharePoint, SourceForge

Testing Tools: TestDirector, Quality Center

Administrative Systems: Ingenium, PolicyLink, Vantage One

Eazl Pharmacy Systems: AQC, ProdTree, APT, CCFE, PSA, CCI, AAS, OLR, Connecture

Eazl Mutual Systems: EPM, Automated Client Eligibility System-ACE, Client Database-CDB

Eazl Systems: DIPMS, App Capture, ePolicy, FieldNet, Contract Packaging Database-CPDB