

User Experience and Information Design

I am based in New York City, like to work in and mentor design teams and am comfortable managing projects and stakeholders. I have a good bedside manner, can think laterally, ask stupid questions, and crave complex, difficult problems to simplify and solve.

- Over 18 years' experience in IA/UX/UI product design in banking and finance; Background in graphic and communication design
- Specialized in working with complex data sets and workflows in multiple screen environments
- Strong analytic, strategic, creative, and visual problem solving skills
- Have successfully managed local and remote teams through collaborative, iterative user-centered design processes
- Experienced at managing and mentoring junior designers on numerous engagements
- Excellent written, verbal and presentation skills

Processes & Techniques

User Centered Design	User Story Mapping	Data Visualization	Lean/Agile/Squad Frameworks
Design Thinking	Persona Development	Wire-framing/Prototyping	Accessibility Compliance Design
User Research & Analysis	User Testing	Visual Design/Branding	Design Systems

Tools

Adobe Creative Suite	Word/Excel/Powerpoint	Keynote/Pages/Numbers	Pen/Pencil
Sketch/Figma	Miro	Axure/Balsamiq/Invision	Paper
JIRA/Confluence	Basecamp	Slack/Zoom/Skype/Teams	Whiteboard

Work Experience

Lead Product Designer **Foundry Digital** 11/23 – Present

- Design oversight of their *Optifleet* and *USA Pool* enterprise crypto mining service products. The former is their mining site and equipment operations logistics portal, the latter is their central hub to one of the largest bitcoin pools in the United States. It provides oversight of all aspects of alpha generation and performance efficiencies. Through these products we are developing our *Metal Design System* to streamline future expansion into new DeFi capital management service products.

Team Manager/Lead UX Designer **Rakuten Advertising** 2/21 – 5/23

- Directed four UX designers in modernizing Rakuten's affiliate marketing platforms: *Advertiser Dashboard*, *Publisher Dashboard* and *Insights & Analytics Portal*. I oversaw my design team's collaborations with stakeholders in user-centered design processes, for the above product platforms and our *Blueprints design system*. Recent achievements include a unique hybrid navigation/marketing design scheme for Insights & Analytics Portal, and AI-driven Publisher Placement Recommendations, Campaign Lift Test and Affiliate Conversion Journey reports. *Insights & Analytics Portal* won *Hello Partner's 2023 Gold Trophy: Most Innovative Technology*, and *2023 MarTech Breakthrough Performance Marketing Innovation Award*

VP UX Product Lead **JP Morgan Chase** 9/16 – 11/20

- UX Design Lead for their proprietary *CRM* platform, guiding Product Manager, BA and Dev teams, using our new *pattern library* and *desktop framework*. We incorporated *AI learning* algorithms to provide insights to Client interest trends and activities. This enabled better discovery and anticipation of client needs, and complemented the second project I manage:
- Redesigned the J.P. Morgan *Markets Research Subscriptions* platform to provide enhanced ability to explore and discover research through better organization, granular controls and content previews. These informed our *CRM meta-data tagging* system, allowing sales teams to define customizable, long-tail profiles of their audiences and optimize marketing communication strategies.

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Lead UX Consultant

Codestreet

3/05 – 3/16

- Lead a team to design and improve **DeutscheBank's RiskOffice** and *Collateral Workbench* applications
- Designed the *MyFi* portal for **Citi** - providing online financial advisor and management services to targeted net worth clients
- Managed a UX and visual design team in creating **Library Corp's LS2/PAC** operations platform
- Designed visualizations and data analysis workspaces for **BusinessObjects**, including a patented "KPI Barometer"
- **Morgan Stanley** User journeys for post-2009 mobile/desktop financial advisor platform; Lead a requirements gathering and discovery team for a new retail banking platform, from which we designed initial wireframes; Designed and managed development of a FinTech Research Portal; Numerous UX design improvements their legacy CRM platform
- Lead a team of designers to create a metrics reporting/analysis platform for **EmailVision**, including dashboard layouts, workflows, and several KPI visualization concepts
- Researched and created an improved 32-color palette used in **SAP's** enterprise analytics charting software

Lead UX Product Designer

Codestreet

3/05 – 3/16

- Worked in and directed small teams designing numerous components of the *Teamwork* fixed income platform, including features such as Bid Lists, Notepad, CDS, and Bloomberg integration
- Directed a team designing *Market Data Works* which records and replays market data for system testing and forensics analysis
- Designed the *Dealer Pool* fixed Income negotiation and trading platform, allowing peer-to-peer discovery of liquidity and anonymous trading without loss of proprietary credit knowledge
- Created product brand marks, advertising and marketing campaign collateral materials for Codestreet's products
Codestreet was acquired by Tradeweb on March 1st, 2016

Principal; UX Designer/Team Manager

New York Chart & Diagram

10/01 - 3/05

- Founding partner of this UX design firm, specializing in information architecture, user interface and information design
- Clients included **DeutscheBank, Addison-Wesley, BusinessObjects, the YIVO Institute, CSC** and **Codestreet**
- Managed projects and directed junior designers in numerous UX/UI and visual design engagements, visual explanations and educational multimedia projects

Patents

[Nº US 62/652,452](#)

April 4, 2018

System and method for implementing an intelligent customer service query management and routing system

Awards

US Partnership Awards

April 2023

Gold Trophy: *Most Innovative Technology - Rakuten Insights & Analytics Portal and Data Labs*

MarTech Breakthrough Awards

August 2023

2023 Performance Marketing Innovation Award: *Rakuten Insights & Analytics Portal*

Education

Rhode Island School of Design

Bachelor's Degree

Providence, RI

Art Center College of Design

Foundation Design Coursework; Filmmaking

Pasadena, CA