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SENIOR AI STRATEGY & TRANSFORMATION LEADER

Company-Wide AI Vision, Strategy, Governance & Value Realization | 30+ Years Leading Enterprise Transformation

EXECUTIVE SUMMARY

AI strategy and execution leader with 30+ years driving measurable business impact through large-scale digital transformation and technology adoption. Proven track record architecting and executing company-wide AI strategies, establishing governance frameworks, and mobilizing cross-functional teams across matrixed organizations. Deep expertise bridging technology, product, business strategy, and organizational capability to unlock AI-driven growth, productivity, and customer value. Currently advancing PhD research on reliability frameworks for LLM-based agents - work that directly informs enterprise AI governance and risk strategies. Demonstrates strong executive presence with credibility across technology, product, and business leadership. Author of three books, "Ethical AI in K-6 Education: Everyday Classroom Practice for Agency, Confidence, and Equity", "The Ethical AI Argument: Why Educators Must Rethink AI in K-6", and soon to be released, "AI or Extinction: The C-Suite Reckoning".

PROFESSIONAL EXPERIENCE

CognitionHive – Founder & Principal Consultant

Oct 2025 – Present | Remote

Architecting and executing enterprise AI strategies for Fortune 500 companies and regulated enterprises, establishing the playbooks and governance frameworks now deployed at scale.

AI Strategy & Governance Leadership:

- Designed enterprise-wide AI strategy, governance structures, and decision-making frameworks for a financial services organization; established compliance-aligned risk mitigation protocols and reliability assessment methodologies
- Led AI data remediation and transformation initiative for the largest online course provider in the U.S., establishing reusable patterns for scaled, trustworthy AI deployment, defined success metrics and value realization roadmap
- Advised regulated enterprises (FinTech, Banking, Financial Services) on company-wide AI adoption, prioritization, and governance; established clear pathways for resource allocation and execution accountability across technology and business functions

Transformation & Execution Leadership:

- Drove cross-functional alignment on AI priorities, translating executive strategy into clear technical requirements and organizational capability needs
- Established program-level governance for AI initiatives: what work is happening, where, how it aligns to strategy, approval, and tracking mechanisms
- Partnered with technology, product, and business leaders on vendor selection, platform rationalization, and ecosystem integration

Outcome: Currently synthesizing consulting engagements into a scalable AI transformation playbook for enterprise deployment.

SALESFORCE – Technical Architect, Internal AI Transformation

May 2021 – Sep 2025 | San Francisco, CA / Remote

Led internal AI transformation initiatives while designing scalable AI architectures for enterprise customers. Positioned as a trusted advisor to stakeholders on company AI direction, value realization, and execution strategy.

AI Strategy & Vision Leadership:

- Helped design and execute company-wide AI strategy aligned to Salesforce's transformation priorities; architected LLM-enabled prototypes (Atlas Reasoning Engine) for omni-channel personalization; contributed to product AI capability roadmap as part of Lotus Foundations team
- Worked on AI governance and decision-making frameworks to balance innovation velocity with execution discipline; participated on architecture review boards, ensuring adherence to AI principles and future-state alignment
- Assisted in defining success metrics and KPI frameworks for AI value realization across implementations; mentored architects on governance-aligned design patterns and scalable AI architectures

Execution & Cross-Functional Leadership:

- Designed and delivered middleware and integration strategies using Salesforce and MuleSoft platforms; established governance models and continuous delivery frameworks for enterprise transformations
- Conducted enablement workshops on Data Cloud governance, API integration, security, and change management, mentored solution architects on scaling AI responsibly across complex organizations
- Facilitated cross-functional stakeholder alignment sessions with business, product, and technology leaders; translated strategic AI vision into clear pre-build roadmaps and execution plans

Organizational Impact:

- Influenced technical priorities and resource allocation for AI-first product development; established dotted-line partnerships across data science, ML engineering, and platform teams
- Demonstrated strong executive presence; served as a trusted advisor to AI CoE leadership on AI pricing, investment decisions, and strategic priorities

Recognition: FY2023 & FY2024 AMER Better Together Awards; FY2024 Win \$10K the AI Way!

THERMO FISHER SCIENTIFIC – Salesforce Transformation Leader

2019 – 2021 | Carlsbad, CA / Remote

Led company-wide digital transformation for the Life Sciences Division (\$18 billion in annual revenue, 3,400 users), demonstrating ability to drive execution accountability and measurable business value across a complex, matrixed organization.

Transformation Leadership & Change Management:

- Owned end-to-end strategy and execution for greenfield Salesforce implementation spanning multiple business units; established clear priorities, sequencing, dependencies, and required capabilities
- Drove organizational change management and user adoption, achieving 95% adoption rate in the first week; mobilized cross-functional stakeholders across technology, product, and business functions
- Established program governance for platform implementation; defined success metrics and value realization roadmap aligned to business transformation goals

Execution & Operations:

- Secured commitment of resources and prioritization from functional leaders; identified and resolved execution risks, bottlenecks, and misalignment
- Implemented robust integration governance, performance tuning, and compliance frameworks; ensured disciplined decision-making without slowing innovation
- Delivered executive-level communications and technical briefings to senior stakeholders; demonstrated strong executive presence across organizational functions

Business Outcome: 95% adoption in first week; established operational foundation for continued platform expansion and value realization.

SIMPATIC – Co-founder, Chief Technology Officer

2014 – 2018 | San Francisco, CA

Architected and scaled a secure cloud-native platform as founding technical leader; demonstrated ability to balance innovation with governance and security accountability.

Technology Strategy & Governance:

- Designed and implemented secure, scalable, cloud-native architecture; established governance frameworks and security protocols to meet regulatory requirements and client trust standards
- Led technology team and engineering practices aligned to product strategy and client value delivery; established DevSecOps practices and disciplined development processes
- Engaged enterprise clients in evaluating ROI from technology investments; translated technical capabilities into clear business value propositions

LLA FINANCIAL LTD. – Founder, CEO

1991 – 2014 | San Diego, CA

Built and scaled a profitable FinTech firm to 30 FTEs over 23 years; demonstrated long-term capability in leading complex organizations through transformation and change.

Strategic Leadership & Business Transformation:

- Advised major banking and financial services institutions on middleware integration, API platforms, and secure data governance; established trusted advisor relationships with C-suite and technology leaders
- Delivered strategic architecture roadmaps and change enablement programs aligned to each client's business transformation goals
- Established organizational capabilities, processes, and governance for sustained growth and value delivery

Business Outcome: 23-year profitable operation; expanded client base across the financial services sector; established reputation as trusted technology strategist to bulge bracket investment & money center banks.

EDUCATION

Doctor of Philosophy (Candidate) – Technology

Walsh College | Expected Completion: June 2028

Specialization in Artificial Intelligence & Machine Learning. Dissertation research focuses on developing reliability frameworks for LLM-based agents in enterprise environments, with emphasis on hallucination detection, uncertainty quantification, and operational trustworthiness. Direct application of research to enterprise AI governance and risk management.

Master of Science in Artificial Intelligence

Woolf University via Udacity Institute of AI & Technology | Expected Completion: Mar 2026

Specialization in applied AI systems, focusing on trustworthy deployment, reliability, and explainability in production environments. Coursework emphasizes problem framing, modeling, evaluation, and stakeholder communication for enterprise AI implementations.

Master of Business Administration

Columbia Business School | Merit Fellowship Recipient; Top 1% of Cohort

Bachelor of Business Administration

College of William & Mary | Emory University Business Competition Winner

CORE COMPETENCIES & EXPERIENCE

AI Strategy & Leadership: Company-wide AI vision and roadmap development | AI governance and decision frameworks | Strategy translation to execution | Cross-functional leadership and stakeholder alignment | Value realization and success metrics

Transformation & Execution: Large-scale digital transformation leadership | Change management and organizational adoption | Resource mobilization and prioritization | Risk identification and resolution | Execution accountability across matrixed organizations | Program governance and discipline

AI Technology & Platforms: Modern AI capabilities and limitations | LLM agents and reliability | Data strategy and governance | Salesforce and Data Cloud | MuleSoft and enterprise integration | Cloud platforms (AWS, Azure, GCP)

Leadership & Credibility: Executive presence and communication | Trusted advisor to C-suite | Cross-functional team leadership | Mentoring and organizational development | Strategic orientation with disciplined execution

Industries: Financial Services | Life Sciences | Education Technology | Telecommunications | Enterprise Software

CERTIFICATIONS & CREDENTIALS

- Salesforce: 38+ Certifications including System Architect, Application Architect, Data Cloud Consultant
- AWS: AI & Cloud Practitioner Certification
- Oracle: AI Foundations & Generative AI Professional
- Enterprise Architecture: TOGAF, BIAN, ITIL
- Project Management: PMP, SAFe Agilist
- Security & Compliance: SSCP, Zero Trust Architecture, GDPR/HIPAA/CCPA
- Additional: CPA, Eligible for DoD Secret Clearance (SSCP aligned with DoD 8570)

KEY QUALIFICATIONS ALIGNMENT

- ✓ 30+ years proven experience leading large-scale transformation through advanced technologies (well exceeds 15+ years of experience)
- ✓ Track record of delivering measurable business impact through AI (95% adoption at Thermo Fisher; AI value realization frameworks at Salesforce; company-wide governance at consulting clients)
- ✓ Deep understanding of modern AI capabilities and limitations, with ability to translate technical concepts into business priorities (PhD research + Salesforce Atlas/Lotus work + current consulting strategy)
- ✓ Strong executive presence with ability to influence, align, and mobilize senior leaders and cross-functional teams (Salesforce stakeholder alignment; Thermo Fisher 3,400-user transformation; consulting advisory role)
- ✓ Strategic orientation with ability to successfully drive execution across complex organizations (23-year FinTech CEO; Salesforce transformation leader; current consulting CEO)
- ✓ Deep credibility with technology, product, and business leaders (Salesforce internal and customer relationships; Thermo Fisher divisional leadership; financial services and education technology clients)
- ✓ Experience operating effectively in matrixed, resource-constrained environments (Salesforce cross-functional partnerships; Thermo Fisher multi-unit coordination; consulting across regulated industries)
- ✓ Ability to balance innovation with discipline and accountability (Atlas/Lotus innovation + governance frameworks; consulting value realization focus)