Profile

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Boca Raton, FL

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**Outcome-Led Product Manager** with 25+ years of software product management experience and deep expertise in content governance, strategy, and knowledge systems and Ai. Proven ability to translate strategic business goals into measurable product outcomes, driving impact through continuous discovery, opportunity mapping, and assumption testing. Skilled at aligning data stewardship, technical capabilities, and stakeholder needs to deliver enterprise-scale transformation. Experienced facilitator of Agile, SAFe, and Scrum practices, with a track record of enabling teams in healthcare, fintech, and AI to focus on outcomes over outputs and deliver lasting value.

Competencies

* Product Roadmap
* Product Strategy
* Stakeholder Management
* UAT/ UX and A/B testing
* Outcome Orientation and Metrics
* Mockups, prototypes (Figma, XD, Balsamiq)
* Collaborative Leadership
* Jira/Confluence/Planview/Azure DevOps
* OKR/KPI
* **Continuous Discovery**
* **Stakeholder Alignment**
* Impact Measurement
* Strategic Themes
* User Stories and Epics in Jira
* Product Management
* Visual & Systems Thinking
* Lean, Agile and Adaptive Mindset
* Opportunity Framing & Mapping

Experience

**Senior Product Manager/ Owner*****01*/2024 – Present**

Signature Performance, Inc. - Remote

* **Led product feature, Epic, User (Mapping, Case, Story) requirement and acceptance criteria development in Jira** for the Veteran Affairs (VA) healthcare portal, ensuring seamless access to healthcare services for veterans and their families.)
* Defined and prioritized product roadmap, OKR , KPIs in Confluence, aligning business goals with user needs. Defined and led planning and reviews.
* Managed, Approved Strategic themes and Designed UX/UI
* Ensured compliance with federal healthcare regulations (HIPAA, FISMA, FedRAMP) for secure data handling and privacy protection.
* Elicited and refined requirements from key stakeholders, ensuring alignment with VA regulations and user expectations.
* Optimized user experience (UX) through Figma-based wireframes and prototypes, enhancing accessibility and usability

**Senior Staff Product Manager */ Owner*** ***09*/2022 – 12/2023**

GlobalLogic, Walgreens - Remote

* Elicited Epic-level and User Story requirements **and acceptance criteria** in Jira from business stakeholders and defined the roadmap priority and business value for program increments on Patient Care Portal (Pharmacy)
* Product lead an AI initiative using Amazon's hosted ChatGPT to summarize pharmacists’ clinical notes and develop predictive models identifying patients at high risk of missing prescription pickups, improving patient adherence and pharmacy efficiency.
  + Define and prioritize user stories for summarizing pharmacists' notes into actionable insights
  + Collaborate with data science and engineering teams to develop predictive models for identifying patients at risk of missing prescription pickups
  + Align cross-functional stakeholders on use cases, business value, and success metrics to support pharmacy adherence programs and workflow optimization
* Trained and coached product team on Scrum and SAFe Transformation
* Facilitated the company's first SAFe program planning and implementation.
* Ensured product discovery, requirements, and Figma UI/UX designs were established to maximize the business value and complete all planned work for the program increments.
* Served as the primary contact between Product Management, Architecture, and Development for product requirement decomposition and questions.
* Captured stakeholder feedback from product review events and established a feature requests list for incorporation into the product roadmap in Asure Devops.

**Senior Product Manager****12/2021 - 09/2022**

Beacon Hill Technologies, CVS Health - Remote

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* Responsible for a portfolio of early prototype and proof of concept development initiatives
* Trained team on Kanban and Value Stream Management
* Implemented and trained Kanban tool "Planview Leankit”
* Assemble project deliverables (Confluence, User Stories, and Epics) and establish a collaborative environment across a team of contributors.
* Work with architects, testers, and vendors, ensuring project plans and deliverables are being created, dashboarding, managing risk and issues, issue resolution, conflicts, and dependencies.

**Technical Product Manager** **07/2021 – 11/2021**

CloudHesive - Ft. Lauderdale

* Established an MVP for contact center, virtual desktop, media streaming, and cloud marketplace to enhance AWS Connect service offerings within AWS cloud infrastructure and twilio IVR workflows.
* Integrated Twilio IVR into AWS Connect for contact center MVP, enabling agile task tracking, agent handoff visibility, and improved support ticket resolution efficiency.
* Implemented and trained Scrum for the first-ever product team.
* Directed product management, user experience design, and business analysis, including writing user stories and epics.
* Identified and filled product gaps across the current platform to support productization.
* Created Figma mockups of the MVP for the contact center and cloud services.
* Managed UX design in Figma and ran design sprints.

**Sr. Product Owner**  **10/2019 – 07/2021**

Accion Labs, Boca Raton, FL

* Spearheaded the integration of Amazon Connect with Twilio enabling Cinch to manage customer support routing and ticket escalation more efficiently across distributed teams.
* Led end-to-end design and implementation of Twilio IVR systems to streamline call routing and improve customer support efficiency; developed dynamic voice flows using Twilio Studio and integrated them with backend services.
* Collaborated with cross-functional teams to architect a seamless Amazon Connect contact center integrated with Cinch’s CRM and customer identity systems, enabling intelligent call handling and reduced agent workload.
* Created customized Twilio IVR scripts and Lambda functions for real-time call data processing, escalation logic, and fallback routing, achieving a 25% reduction in misrouted calls.
* Conducted iterative prototyping and user testing of IVR call flows to ensure intuitive navigation and compliance with customer service SLAs.
* Implemented analytics dashboards for monitoring IVR performance metrics, including call completion rate, drop-off points, and AHT, leading to continuous optimization cycles.
* Delivered detailed documentation and technical handoffs to ensure sustainability of IVR workflows and future scalability.
* [Designed high fidelity UX](https://shop.cinchhomeservices.com/repair) in Figma, and lead value through scalded Agile delivery to successful MVP launch
  + Feature defining and Scope validation
  + Epic and Story creation **acceptance criteria** and planning
  + Roadmap Definition and presentation.
  + A/B testing with Google Optimize
  + Data Visualization using Google Charts, Tableau and MicroStrategy
  + User funnel (AARRR) analysis
  + Managed Design sprints for UX
* Work with product and business teams to shape forward-looking capabilities to achieve business goals and drive innovation and sales growth by communicating unique client capabilities to customers and investors.
* Outlook, One Note, SharePoint, JIRA, JIRA Align and Confluence, Planview Leankit

**Agile Software Product Management Consultant** **05/2018 - 10/2019**

newLedger Solutions LLC- Boca Raton, FL

* Conducted Scrum master and Scrum owner certification training at New Horizons Computer Learning Centers
* requirement gathering and UI / UX design for [PWBR™](https://pwer.com/) - Personal Wellness Blockchain Record
* Consulted  [LevelBlox](https://www.businesswire.com/news/home/20181003005630/en/AlphaPoint-Technology-Announces-Corporate-Change-LevelBlox-Pending) (OTCQB: LVBX, previously known as AlphaPoint(APPO), a publicly traded software company, building the design and pitch deck, website prototype
  + Guided technology direction and developed engineering roadmap from concept to future platform, including incremental objectives and long-term goals and strategies.
  + Integrated Business Process with Oracle ERP
  + With CEO, raised $2.5 million and received Oracle Scaleup incubation grant award in June 2018.
  + Signed a new blockchain development agreement in January 2019 with AltMed Florida, a vertically integrated medical cannabis company, for a seed-to-sales blockchain application which provided LevelBlox entry into a new market.
  + Enabled AltMed to effectively track/monitor every aspect of the growing process for compliance, resolving issues with current traceability systems and recovering thousands in lost revenue through improved process efficiencies.
  + Directed development and execution of an enterprise-wide information security plan that protected HIPAA confidentiality, integrity, and availability of auditable data and servers.
* Product architect to Agility Launch, formerly BlockchainAgility, served as principal blockchain architect to startup companies to build team vision and create strategically positioned offerings for market adoption.
  + Set long-term technical vision, strategically partnering with key leaders to execute strategy and direct all technology-related development supporting business development, monetization strategy and operations.
  + Provide market analysis, PR, social marketing and launch management.
  + Partner with product management and cross-functional teams to translate product vision into a deliverable roadmap.
  + Oversee recruitment and development for technical staff of 20.
* In [DataBlockChain IO](https://www.datablockchain.io/), I placed the blockchain developers and wrote whitepaper and pitch deck resulting in $28 million in ICO funding. Wrote top listed [whitepaper](https://icorating.com/upload/whitepaper/Q1Q9hzR9ClhdwQWAzMLWeMcRoGz1injhmTQEQaZ5.pdf) for initial coin offering
* For [MercuryCash](https://www.mercury.cash/) Wallet (Miami Crypto Exchange), redefined strategic roadmap and developed pitch deck and [podcast](http://cryptopulse.libsyn.com/ep-46-disrupting-the-116-trillion-global-financial-industry) that resulted in $2 million in private funding. Promoted Miami Crypto Exchange during a speaking engagement at “Voice of Blockchain” 2018 conference.
* Provide services in additional roles and assignments:
  + Advised product dev for Personal Wellness Blockchain Record since 2019.
  + Advised Web3 marketingfor [P3iD Cloud](https://www.hsassocs.com/capture/?mdocs-file=1733), starting in 2018.
  + Advised Web3 marketingto Miami Crypto Exchange, advisor to Pitch Investors Live and blockchain development principal advisor to DataBlockChain from 2018 to 2019.

***Senior* Product Manager/Owner** **01/2003 – 05/2018**

Ricoh Corporation - Boca Raton, FL

* Led new product research and development and product redesign for cloud-based management system (rebranded as i-DOX, Document Mall and [Ricoh Content Manager](https://www.ricoh-usa.com/en/products/pd/software/document-management/document-storage/ricoh-content-manager/_/R-RCM5USER-PS1-2018)).
* Established and prioritized the product development pipeline to support quarterly and annual goals in alignment with CMO's strategy and CEO's vision.
* [Designed and developed](https://www.ricoh-usa.com/-/media/Ricoh/Common/PDFs/Brochures/Software/RICOH_Content_Manager_brochure_2019.pdf) Aficio multi-device copier user interface software, a Ricoh flagship solution installed by Ricoh manufacturers on all copiers, generating $1.5 million to $2.5 million annual revenue with $3+ million ancillary service contract annual revenue.
* Partnered with marketing teams and channel customers to develop and launch new software solutions based on customer needs and business models while evaluating product potential/practicality.
* Provided benchmarking to identify best-in-class designs and key processes and select design concepts and fundamental technology for new products and product enhancement.
* Designed and developed custom Alfresco for document management systems.
* Created, owned, and executed the business unit product development annual calendar. Oversaw key projects, formulating development proposals that included project objective, applications arising from findings, costs, equipment and human resource needs.
* Designed mockups and wireframes for feature validation to develop innovative, exclusive and on-brand products resulting in commercial success and profitable financial growth.
* Worked with stakeholders to determine, maintain and prioritize product backlog, resolving escalated technical support issues and customer roadblocks and establishing acceptance criteria, edge case and completion criteria.
* Collaborated with production managers and purchasing to minimize risks, manage inventory and direct product development during design refinement, sampling and sourcing.

Support Services Manager 01/2000 – 12/2002

Cylex Systems, Ricoh – Boca Raton, FL

* Supported Sales and, partnered with SVP of sales to develop channel sales throughout the US
* Managed support services team of 10 employees and a professional services team of 4 employees.

**Project Manager**  **12/1998 -12/1999**

Forsythe Solutions (NBG) - Coral Springs, FL

**Senior Support Engineer 09/1997 – 12/1998**

Citrix Systems - Fort Lauderdale, FL

Branch Technical Specialist 06/1995 – 08/1997

Ford Motor Credit Company - Coral Springs, FL

Education

* MBA, Business Administration, Nova Southeastern University - Fort Lauderdale, FL, 1997
* BBA, Marketing, Florida International University - Miami, FL, 1995

Certifications

* Certified, Hyperledger, The Linux Foundation, 2018
* Certified, Linux Essentials, LinuxAcademy.com, 2015
* Certified, Project Management Professional (PMP), Project Management Institute, 2015
* Advanced Certified ScrumMaster (A-CSM), Scrum Alliance, 2015
* Certified Scrum Product Owner (CSPO), Scrum Alliance, 2015
* Certified Scrum Professional – ScrumMaster - Scrum Alliance , 2023
* Scrum Foundations Educator - Scrum Alliance , 2023
* Professional Scrum Master (PSM) - Scrum Alliance , 2023
* Professional Scrum Product Owner (PSPO)
* Certified SAFe® Program Consultant (SPC)
* Certified SAFe® Product Owner/ Product Manager (POPM)

Engagements

* Advanced ScrumMaster Instructing, New Horizons Computer Learning Centers, 2019
* Chicago Blockchain Conference, Voice of Blockchain, August 2019
* [KoreSummit](https://www.koresummit.io/?post_type=cth_speaker&paged=2), February 2019
* [PsiGen](https://www.psigen.com/), Resonance, November 2018
* [Blockchain Word Conference 2018 with John McAfee](https://media-exp1.licdn.com/dms/image/C5122AQGTdBMRr3GNqQ/feedshare-shrink_800/0?e=1599091200&v=beta&t=hUkAb4FZOJ88-I5jxFLeGBuiYfj-oOK40EvvnOJMd8Q)
* Blockchain Shift: The 4th Industrial Revolution, October 2018
* Keynote Speaker, Blockchain Leadership @ Chicago by International Data Engineering & Science Association (IDEAS), Blockchainfest @ Chicago, August 2018
* [StartUP FIU Brain Trust](https://twitter.com/startupfiu/status/1010177341979586560), Blockchain the Internet of Transaction: [The Business of Blockchain, June 2018](https://media-exp1.licdn.com/dms/image/C4E22AQHn7XgkNIimYg/feedshare-shrink_800/0?e=1599091200&v=beta&t=FgkcfLhMdPNGQbT5dkfFzsbT0VBTbs2fbIxGkGlqTe4)
* [Miami Dade Annual Technology Conference](https://media-exp1.licdn.com/dms/image/C5122AQE4VhSe8f-UrA/feedshare-shrink_800/0?e=1599091200&v=beta&t=_EUoevwiMMbHNRNzNgsPasQjewaQSaLfsd_OTLNrxZU), [Government & Blockchain, June 2018](https://www.google.com/imgres?imgurl=https%3A%2F%2Fpbs.twimg.com%2Fmedia%2FDgTe74qUYAU10kG.jpg&imgrefurl=https%3A%2F%2Ftwitter.com%2Fstartupfiu%2Fstatus%2F1010177341979586560&tbnid=9Xsf6OAlxxrMrM&vet=12ahUKEwiM_9Kmt8DoAhXHYqwKHZveBL0QMygBegUIARDOAQ..i&docid=EtnrcWH314xO0M&w=1200&h=900&itg=1&q=Blockchain%20james%20whelan&safe=active&ved=2ahUKEwiM_9Kmt8DoAhXHYqwKHZveBL0QMygBegUIARDOAQ)
* mstate.io [Enterprise Blockchain Summit, June 2018](https://www.slideshare.net/robbailey/enterprise-blockchain-summit-event-details)
* [OTCQB Listing](https://media-exp1.licdn.com/dms/image/C5122AQFR9_bBryxt1g/feedshare-shrink_800/0?e=1599091200&v=beta&t=kVWbURJwfl_WGztAjgwqmTQC2Mrlq7vmMuD0xtbtdWg) , [OCT Markets podcast , Consensus 2018](https://otcmarkets.libsyn.com/alphapoint-technology-inc)
* Speaker Submission Reviewer, Global Scrum Gathering New York 2020, Scrum Alliance, 2019-2020
* Conference Ambassador, Blockchain Shift, May 2018