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ENTERPRISE AI ADOPTION & DEPLOYMENT LEAD

SUMMARY

Enterprise AI deployment leader who moves GenAI from first release through security review into confirmed daily use, across 40 enterprise environments with 38 still active in May 2026. Uses AI to build the workflows, not just specify them: an open-source local/cloud model router and a meeting-intelligence pipeline. 12+ years taking enterprise software from rollout to real adoption.

Tools: Claude and Codex for AI-assisted development; Python, REST APIs, MCP, RAG, eval loops, agentic routing; local and cloud LLMs (Qwen); Salesforce, Sigma BI.

PROFESSIONAL EXPERIENCE

AuditBoard, Inc. (now Optro) | Atlanta, GA | Aug 2022 - May 2026

Senior Manager, Compliance Implementation

Directed 200+ GRC module deployments (CrossComply, IT Risk Management, TPRM, RiskOversight) across 50+ enterprise customers spanning global automotive and industrial manufacturing, Fortune 500 biopharma, insurance, logistics tech, and digital-asset financial services, as portfolio manager and hands-on PM with 20-30 modules across 10-15 customers in flight at a time.

- **Enterprise AI Adoption:** Owned customer-side implementation and adoption of Optro's native generative AI suite (Control Assessment Workflow, Auto-Annotate, Document Intelligence) across 40 enterprise environments, closing every engagement on explicit customer confirmation of adoption; 38 of 40 environments remained active through May 2026.
- **Security Design Sign-Off:** Took all 40 GenAI deployments through the mandatory, typically CISO-approved Design Sign-Off gate, translating model confidence scores, automated control selection, and audit defensibility into approval cases customer project leads could defend internally.
- **Enablement & Playbooks:** Authored the Exception Management implementation playbook that Professional Services formally adopted as the team standard (~10 consultants), and built a separate AI-feature rollout playbook to standardize GenAI deployments across customer engagements.
- **Account Expansion:** Sourced \$150K+ in expansion ARR from inside active implementations, spotting live workflow gaps and handing AEs scoped, qualified opportunities that closed.
- **Value Realization Enablement:** Trained customer teams to build their own Sigma BI dashboards reporting AI adoption, framework coverage, and value realization to their executives, replacing manual Excel reporting cycles with live operational visibility.
- **Field Signal to Product:** Documented and channeled customer feedback to Product and R&D with full implementation context; two capabilities shipped as a result: approver notifications and sequenced-approval logic in the Exception Management module.

OneTrust, LLC | Atlanta, GA | Dec 2019 - Aug 2022

Senior Manager, Business Operations, Professional Services

Built and led a globally distributed 5-person Professional Services operations team during hypergrowth, establishing delivery infrastructure for a 400+ consultant organization.

- **Operational Scaling:** Standardized delivery playbooks, onboarding routines, operating cadences, and executive visibility metrics across the global Professional Services organization.
- **Systems Architecture:** Implemented FinancialForce PSA inside Salesforce to systematize time tracking, project management, delivery reporting, GTM handoffs, and operational controls.
- **Cost Optimization:** Saved \$100K+ annually by designing and deploying a Salesforce-native resource management solution to replace a planned vendor expansion while preserving operational requirements.
- **Executive Visibility:** Built BI dashboards with per-consultant views feeding weekly KPI reviews, resourcing decisions, delivery-risk visibility, and operating-model changes.

PREVIOUS EXPERIENCE

- **Director of Strategic Initiatives | KNOW Foods, Inc. (Mar 2018 - Oct 2019):** Managed a complex NetSuite ERP implementation, owned Shopify/Amazon e-commerce P&L, and built a B2B GTM strategy that sourced 20 net-new enterprise accounts.
- **Business Development Manager | Flash Furniture (Jul 2015 - Mar 2018):** Grew e-commerce key accounts (Walmart, Staples, Overstock) by 20% YoY to \$48M in managed revenue and sourced \$15M in net-new enterprise business.
- **Management Consultant | Infosys Consulting (Aug 2013 - Jun 2015):** Supported digital transformation, operating-model design, and system-ready business requirements for financial services clients.

APPLIED AI WORKFLOW PORTFOLIO

Hands-on builds, designed and shipped end to end, demonstrating practical LLM orchestration, governance, and workflow automation.

- **Local/Cloud AI Workflow Router ([GitHub Project](#)):** Built a dynamic AI routing system on Mac Studio/Mini that delegates token-heavy work from cloud models to a local-model fleet via a custom Python library and Calibrate-Then-Act routing logic. Keeps ~90% of eligible work local and cuts cloud-token cost ~25% while preserving speed and reviewable quality, backed by source-grounded checks, JSONL telemetry, and a CI-verified test suite.
- **Meeting Intelligence Pipeline ([GitHub Project](#)):** Built a secure, opt-in workflow using OpenAI Codex, Claude, and source-grounded review that turns sanitized, PII-free call notes into recaps, risk flags, task owners, and follow-up drafts. Cut drafting from roughly 30 minutes to 5 per call (83%) across 52 customer calls in one month, run as a personal tool within enterprise data-governance constraints.

EDUCATION & CREDENTIALS

- M.S., Information Systems, Indiana University, Kelley School of Business (2013)
- B.A., Economics, Indiana University, College of Arts & Sciences (2012)
- Salesforce Certified Administrator | Morning Brew seed investor (2017, exit) | Smpl investor/advisor (2019 - 2022)