

A multidisciplinary strategic thinker and creator, with a cross-sector technical and creative problem solving toolkit. Motivated collaborator, eager to maximize systems, processes, and teams to find innovative solutions to complex challenges. Versatile project and team lead, balancing multiple concurrent priorities, responsibilities, and development streams.

Professional Experience

Akkodis, OIPA Consultant (Americo Project) [2023 - Present] | (Remote)

Phased modernization of legacy systems to implement an indexed universal life and term product with both new business processing and general administration areas within the OIPA system. Updates required as a concurrent buildout of multiple plans on top of existing products that were already in production as well as multiple separate streams in development and entering final testing before going live.

Supported annuities product implementation with configuration of both new business and policy systems. Configured new business application processing for an additional, recently acquired term product and company with needs for standard application processing and reissues.

Contributed to discovery, general development, documentation, release planning, production support and system-wide bug fixes. Responsibilities also included general support of junior staff internal to the client as well as external resources including a separate team of non-Akkodis resources. This OIPA implementation also required integrations with multiple external systems that expect regular communications.

Equisoft, Technical Trainer [2021 - 2023] | Philadelphia, PA (Remote)

Developed and delivered multiple OIPA based training programs for both internal resources and external client projects, including leading trainings for international audiences, both onsite and remote. Developed tailored curricula for multiple insurance products and audiences, including Life, Annuities, Group, and Property & Casualty. Developed and led OIPA trainings including: Beginner Configuration, Technical, New User (for BAs), Illustrations, Group, Administration (delivered projects).

As Technical Trainer, was also responsible for general environment maintenance, including monitoring and maintaining server deployments on weblogic. Managed general system maintenance, including the clean removal of entities and manual database updates as well as user access and security features.

Training topics include: basic configuration, Rule Palette, technical development, system integrations, group customer configuration, advanced configuration, new business processes, accounting processes, claims processes, and the Design application (Equisoft's web based IDE for configuration). Currently developing training for supplemental software that works with OIPA, training for project managers, and user training for fully configured systems and expected scenarios.

- Taught 250+ resources OIPA configuration

- Consulted for 7 companies and 10+ OIPA projects from sales demo process through development, go-live and production support

- Co-developed Equisoft University training platform and content

- Developed in-house configuration best practices

Equisoft, Functional Developer [2018-2021] | Philadelphia, PA (Remote)

Versatile self-starter working to fulfill client needs and creatively implement valuable and innovative solutions. An integral resource and manager supporting the team through a variety of capacities and across a multitude of workstreams. Experienced with Whole Life, Term Life, and Universal Life products, and configured processes for new business/underwriting, premiums, billing, claims, policy changes, reissue, agency/commissions, and disbursements.

- OIPA Configuration, Internal Resource and Client Trainings

- Business Analysis, Product Design and Development, Client Demo and System Education

- Built automated EFT draft process applied to multiple projects

Professional Experience (Continued)

Epic Renewal, Co-Founder and Lead Investor [2016-Present] | New England, USA (Formerly Los Angeles, CA)

Co-founder of a social venture committed to creating access to sustainable choices. Executive direction, business development and partnerships. Analyzing acquisition and deal flow.

B2B and B2C Consultations - Composting Implementation and Sustainable Business Solutions
On-Site and Event Zero Waste Solutions, Sales and Client Management, Team Training and Management
Mobile Native Application Development, Application/Server Integrations
Refill shop and zero waste initiatives

Key Program, Inc., Assistant Program Supervisor [2015-2016] | Fall River, MA

Integral manager bridging regional management and program staff at a shelter serving at-risk and displaced youth. Adaptable team leader and valuable youth mentor, overseeing regional support programs.

Youth Shelter Program Administration, Client and Family Services
Staff Training and Management, Purchasing and Activity Planning

Education

University of Southern Maine [2013-2014]

Post-Baccalaureate Pre-Medical Certificate
Distinctions: Dean's List

University of Rhode Island [2011-2013]

Bachelor of Arts in Psychology, Magna Cum Laude, GPA 3.63
Minor: Society, Law and Justice
Distinctions: Psi Chi, Golden Key, ODK, IDLS

Skills

Systems & Proficiencies

OIPA, SQL, XML, XSLT
Rules Palette, Equisoft/Design
JIRA, NetSuite, Confluence
Linux, Windows, Mac
Word, Excel, PowerPoint
Wordpress, WooCommerce, PHP
Android, Kotlin, Java

Languages

English (*Fluent*)
Spanish (*Intermediate*)
French (*Intermediate*)
Italian (*Basic*)
American Sign Language (*Basic*)

Certifications

FLMI Level 1 - LOMA [2023]
Associate Trainer - IBCT

References

Rosemary Brawn, OIPA *Configuration Consultant - Akkodis* 10 years, (856)-906-6289
Tess Feigenbaum, *Co-Founder; COO - Epic Renewal* 15 years, (914) 400-9804
Elizabeth Kreiser, *Sr. Analyst, Application Development - Lincoln Financial Group* 10 years, (717) 919-5979