

PORTFOLIO / SELECTED IMPLEMENTATIONS

Technology rollout. Product adoption. Operational results.

FOUR FIELD-TESTED CASE STUDIES • 2026

I work at the intersection of product delivery and the people who depend on it. Across sales platforms, digital adoption tools, internal support systems, and hospital patient access, I have translated frontline needs into usable workflows, trained teams through change, and supported go-lives when the real-world issues started appearing.

SELECTED IMPLEMENTATIONS	SALESFORCE TRAINING	EPIC TEAM LED
4 programs / platform rollouts	300+ employees / 2 centers	15 employees directly

What connects these projects

- Discovery with the people doing the work: interviews, observation, workflow mapping, and handoff of change requests.
- Practical delivery: embedded guidance, SOPs, training, phased pilots, go-live support, and post-launch reinforcement.
- Business-minded improvement: focus on completion, data quality, employee adoption, issue patterns, and operational impact.

Case study index

01 Pax8 / WalkMe Worked with a business analyst from discovery through launch across onboarding, sales, and lead generation.

02 Camping World / Salesforce + HALO Led user enablement through CRM adoption and a second ESP insurance-quoting application.

03 Netflix / OB1kanobe Supported phased deployment for ~20 IT support teams; handled frontline training and issue escalation.

04 The Christ Hospital / Epic Managed and trained a 15-person registration team; improved ID and insurance verification controls.

How the outcomes are described

Performance figures are reported business/program outcomes, not independently audited results or causal claims. Where another team owned measurement or system configuration, the case studies identify that distinction. No unverified training-completion percentages or formal product-owner titles have been invented.

CASE STUDY 01 OF 04 | 2018-2020

WalkMe | From Discovery to In-App Adoption

PAX8 | Content Developer / Instructional Designer

USERS	DELIVERY	REPORTED PROGRAM RESULTS
3 departments	Built with a business analyst	33% lower turnover / 21% higher retention

The business need

Employees working in onboarding, sales, and lead generation needed clearer in-system support. Processes varied by role, and agents could lose momentum on unfamiliar fields, multi-step workflows, or changes to the user interface. Standalone courses were not enough when help was needed at the point of action.

My contribution

- Led discovery conversations with SMEs, managers, and team leads in each department to understand processes, daily system use, frequent questions, and learning gaps.
- Partnered with a business analyst from solution development through launch, translating observed friction into targeted in-app guidance. Other teams owned portions of the platform and system operations.
- Developed Smart Walk-Thrus, SmartTips, highlighted fields, and next-step prompts so representatives could complete the right actions directly in their workflow.
- Designed first-login orientation, guided onboarding sequences, and checklist-style progress support; used contextual triggers and branching for complex role-dependent steps.
- Supported feature-change communication using targeted highlights and updated guidance, alongside SOPs, manuals, courses, workflow questions, access guidance, certificates, and formal training-completion processes.

Release and adoption approach

The rollout centered on three recurring needs: new-user onboarding, accurate completion of high-frequency workflows, and adoption of changed features. I focused on making the right help appear at the moment it was needed, then reinforcing behavior through structured training and accessible reference content.

BUSINESS CONTEXT AND IMPACT

The broader onboarding and adoption initiative reported a 33% reduction in employee turnover and a 21% improvement in client retention. Those results were reported for the initiative; there is no verified evidence that WalkMe alone caused the changes.

Product-management relevance

User discovery • business-analysis partnership • task-flow design • interaction-level guidance • multi-department adoption • release enablement

CASE STUDY 02 OF 04 | 2016–2018

Salesforce + HALO | Two Connected Rollouts

CAMPING WORLD / GOOD SAM | Corporate Trainer / Enterprise Sales Enablement

PEOPLE TRAINED	DEPLOYMENT	REPORTED PROGRAM RESULT
300+ in 2 centers	Phased pilots + sprint demos	27% higher sales productivity

The business need

Sales teams were moving to Salesforce, followed by an ESP-specific internal insurance quoting tool called HALO. HALO used customer information from Salesforce to support quoting. Both changes needed to fit real sales conversations, minimize re-entry, and keep agents productive during transition.

My contribution

- Conducted firsthand user observation by sitting with agents across departments, watching the tools they used, identifying workflow bottlenecks, and capturing friction in their day-to-day work.
- Participated in weekly working sessions with Salesforce and internal stakeholders to refine process flow based on the way agents actually worked.
- Supported iterative testing, sprint demos, pilot groups, and phased go-live activities rather than a single all-at-once switch.
- Designed and delivered Salesforce enablement for more than 300 employees across two sales centers, using departmental examples, user champions, and train-the-trainer cohorts.
- Supported a second rollout for the ESP department: HALO, an internal insurance-quote system that drew relevant Salesforce customer information into the quote process.
- Reinforced adoption with change communications, demonstrations, job aids, coaching, feedback, and support as teams migrated to the new systems.

What changed between the two programs

The first program established Salesforce as a shared CRM workflow across sales centers. The follow-on HALO project focused on a narrower group—ESP representatives—and the practical handoff of data into insurance quoting. That required both system knowledge and sensitivity to how a role-specific workflow differs from general CRM use.

BUSINESS CONTEXT AND IMPACT

The broader change effort reported a 27% increase in sales productivity. Another team handled the calculation; the underlying baseline, reporting window, and attribution across Salesforce and HALO are not available. Training completion was tracked, but a reliable percentage was not retained.

Product-management relevance

Voice of user • vendor collaboration • workflow design • sprint demos • pilot/UAT participation • phased adoption • change management

CASE STUDY 03 OF 04 | 2010–2015

OB1kanobe | Frontline Rollout and Service Continuity

NETFLIX | IT Team Lead / Training & Deployment Support

IT SUPPORT TEAMS**Approximately 20****TYPICAL TEAM SIZE****About 15 agents****RELEASE METHOD****Phased, team by team****The business need**

Netflix deployed OB1kanobe into a busy IT support center with phone, support, and content workflows. The operational challenge was bringing teams onto a new system without disrupting customer response, call handling, and issue resolution.

My contribution

- Served as a hands-on deployment resource on the floor, preparing and supporting teams as the system was introduced in phases across the center.
- Developed staff training and SharePoint knowledge resources, including practical FAQs based on recurring questions during real use.
- Collected reports from agents, team leads, and managers—primarily by email—and worked through live rollout questions or directed issues to the right support contacts.
- Helped triage phone connection failures and dropped calls as they affected queues, first-response times, and customer escalation volume.
- Used operational feedback to prioritize the most urgent training and knowledge gaps between releases, keeping frontline teams informed as changes occurred.

What happened at go-live

Issues were visible immediately: connections failed, calls dropped, queues rose, and customer escalations increased. My role was not to own the underlying telephony platform or the quality assurance scorecard. I was the person close to the work—helping staff respond, recognizing recurring patterns, communicating issues, and turning lessons into clearer support material.

OWNERSHIP BOUNDARIES

The QA department set and reviewed first-response and resolution service-level targets. I supported operational response and issue visibility during deployment; I did not establish the SLA thresholds.

Product-management relevance

Phased launch • frontline readiness • incident triage • stakeholder communication • support-content strategy • post-launch stabilization

CASE STUDY 04 OF 04 | 2008–2009 rollout period

Epic | Safer Patient Registration Workflows

THE CHRIST HOSPITAL | Overnight Registration Manager

FUNCTIONAL COVERAGE	DIRECT REPORTS	EPIC TOOLS USED
6 patient-registration areas	15 trained and managed	Prelude / RTE / Grand Central

The business need

During the hospital’s larger Epic implementation, patient-registration work needed to remain accurate across multiple care settings, including Emergency, maternity/obstetrics, and same-day surgery. A recurring problem was staff assuming demographic or insurance information already on file was still correct, rather than verifying identification and insurance cards. That created gaps with downstream revenue-cycle consequences.

My contribution

- Oversaw overnight registration operations and directly trained and managed a team of 15 employees within a broader six-area patient-access implementation scope.
- Formally documented existing registration workflows, analyzed gaps, and escalated proposed system and process changes to the Epic implementation team.
- Supported staff using Epic Prelude for registration, RTE for insurance eligibility verification, and Grand Central for admission/discharge/transfer-related workflows.
- Identified missing identity and coverage-verification steps through audit findings and advocated for required/gated fields to prompt staff to recheck patient information rather than rely on stale records.
- Developed an audit report to identify registration tasks left incomplete and support feedback, coaching, and corrective action.
- Delivered role-based instruction, hands-on support, and process reinforcement while the organization transitioned to the new workflows.

The improvement story

The work linked an observable frontline behavior—skipping re-verification—to measurable audit exceptions and billing risk. I documented the gap, brought the change requirements to the Epic team, supported the added verification control, and used an audit report to reinforce correct registration practices. I did not personally claim underlying Epic configuration ownership or formal Epic certifications.

SCOPE AND HISTORICAL CONTEXT

The hospital’s broader Epic initiative included major milestones in 2008 and 2009. Those organizational dates are not presented as the precise start and finish of my six-area rollout. An estimate of 50–60 people describes the wider affected audience, not the employees I directly managed (15).

Product-management relevance

Operational discovery • workflow documentation • controls and validation • change escalation • audit-driven improvement • cross-department adoption

INTERVIEW COMPANION / PRODUCT MANAGER II

Connect the implementations to product outcomes

MY 20-SECOND POSITIONING

YOUR CAREER THROUGH-LINE

“I’ve spent my career helping organizations introduce technology into complex, high-volume workflows. My strength is connecting discovery with the realities of implementation: understanding how people work, collaborating on changes, building practical guidance, supporting phased launches, and using frontline issues to improve adoption.”

Choose the example that answers the question

How do you discover user needs? Pax8: interviews with SMEs, managers, and leads; Camping World: shadowing sales agents.

How do you deliver across stakeholders? Pax8: business analyst partnership; Camping World: weekly Salesforce workflow sessions.

How do you support phased releases? Camping World: pilots, sprint demos, champions; Netflix: team-by-team deployment.

How do you handle issues after launch? Netflix: dropped calls, queue impacts, email escalations and evolving SharePoint FAQs.

How do you improve performance? Christ Hospital: registration audit, required-verification controls, and coaching.

Be precise about ownership

- WalkMe: you partnered with a business analyst; another team owned portions of platform administration and analytics.
- Camping World: you participated in sprint demos, pilots and change management; another group calculated the 27% productivity change.
- Netflix: QA owned SLA targets; you supported deployment, frontline response and knowledge resources.
- Christ Hospital: you led and trained 15 direct reports, escalated changes to the Epic team, and worked within a broader hospital initiative.

Short source and evidence note

Case studies use your firsthand project descriptions. Product names and application functions are consistent with public vendor documentation. Earlier background research on the hospital’s 2008–2009 Epic milestones is organizational context, not proof of individual project scope. Quantified business results are user-reported and are not independently audited.