

Keith C. Lee, PMP

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Work Experience

Charles Schwab

Senior Manager – Product, Client Experience

January 2022 – Present

- Product lead for Schwab Intelligent Portfolios web and mobile experiences resulting in year-over-year increases to client transfer money activity by 350%, logged in engagement by 223%, and enrollment into subscription-based premium experience by 14%.
- Developed and managed product roadmap for integration into core Schwab web and mobile app from separate Intelligent domain to create a unified and consistent experience across all offerings at Schwab, including defining features to migrate, setting UX standards, and converting architecture to Alto framework.
- Ideated, designed, and delivered centralization of Schwab Intelligent Portfolios Move Money experience to existing Schwab domain, removing duplicative development efforts and reduce feature maintenance costs of \$350,000 per year.
- Developed and launched both a retail and an institutional client digital dashboard for Schwab Personalized Indexing for high net worth clients, increasing AUM 114% and number of accounts by 253% since launch. (<https://bit.ly/spi-launch>)
- Delivered Client Traceability and Notifications, creating an end-to-end auditable trail including client actions and rep actions through various products, leveraging Kafka to publish to data warehouse and client emails.

UBS

Product Manager – Associate Director

October 2019 – December 2021

- Led team of three product managers for a suite of products in Financial Advisor workspace that integrated together to produce an end-to-end experience to capture client discovery, produce a financial plan, and create an investment proposal, resulting in increased monthly client output by 52%.
- Modernized the financial advisor workstation, enhanced key financial planning capabilities, and integrated with upstream and downstream products such as book querying and maintenance reporting to drive product usage, increasing unique users by 56%.
- Developed in-house Client Discovery application for managing initial Client and Advisor interaction to begin the client journey, integrating with upstream and downstream applications, including data normalization across applications within the workspace.
- Led large-scale business-critical initiative to update capital market assumptions for the firm's wealth management tools, coordinating testing and delivery across five products.

J.P. Morgan Chase & Co.

Product Manager (Sr. Associate)

January 2019 – October 2019

Product Manager (Associate)

August 2017 – January 2019

- Developed user SLA Dashboard and bulk upload tool, improving visibility for user responsibility, efficiency in data entry, and reducing duplicate data entry, resulting in 37% increased timely reporting and reduction in time spent delivering reports as product lead of a team of product managers.
- Increased volume of files uploaded to the platform by 80% through product enhancements to expand adoption and usage across existing risk businesses, as well successfully onboarding new risk organizations across the firm.

- Developed and integrated Tableau dashboard into the application to provide management with metrics and visualizations to track performance for their associated verticals, centralizing the experience to the singular application.
- Defined and contributed to the product vision by working with stakeholders to determine requirements, including designing enhancements through creating workflow diagrams and UI mockups, and managing product roadmap according to development burn-up and prioritization pivots.

Mitsubishi UFJ Financial Group (MUFG), N.A.

IT Project Manager

June 2016 – August 2017

- Managed large scale, cross-functional (\$500K+ - \$1M) projects of to meet various regulations to produce key deliverables including gap analysis, vendor analysis, budget and schedule forecasting, resource plans, Business Requirements Documents, and change requests as necessary.
- Communicated with and presented to executives and key stakeholders throughout project lifecycles including presenting project status to senior management, executives, and project sponsors at phase gates, implementation go-live meetings, and formal weekly PMO meetings.

Thomson Reuters

Technical Product Manager

September 2015 – June 2016

- Developed product feature enhancements for GoldTier Client Onboarding SaaS implementations, using JavaScript and SQL to code client-specific changes according to defined business requirements and functional specifications, including front-end UI, document preparation, filling, and signature, as well as integration to cross-product offerings.
- Liaison between the client VP of tax implementation and internal development team of the Risk Management division, having applied necessary components of Data Model, Client Hierarchy, Workflows, Business Rules, Data Management, and Documentation Management for Client Onboarding, KYC, Anti-Money Laundering, and other regulation compliance.

Skills

Technical

- Javascript
- Swift & Swift UI (iOS)
- SQL
- Alto Framework
- Backend for Frontend Patterns
- Presentation Services
- Splunk
- HTML

Software Experience

- Tableau
- Confluence
- Figma
- InVision
- Content Management Systems
- Adobe Analytics
- Optimizely
- Excel (pivots, vlookups)

Education & Certifications

Rutgers University New Brunswick, NJ

Bachelor of Arts: Information Technology and Informatics

September 2011 – May 2015

Project Management Professional

March 2017