Caroline O'Sullivan

New York, New York | +1-617-851-4476 | cosullivan11@gmail.com

Solutions-oriented Product Manager with 8+ years of expertise in financial services product development, high-touch client operations, strategic project execution, and cross-functional leadership. Skilled at relationship cultivation, operational transformation, and quantitative analysis. Adept at identifying gaps, developing solutions, and presenting insights to drive informed decision-making.

KEY EXPERTISE

Agile Product Management | Strategic Planning & Execution | Contract Negotiation & Management | Operations Management | People Management | Quantitative Analysis | Process Engineering | Relationship Management | Project Execution | Executive Presentations | Workforce Planning | Problem Solving | Budget Planning | Cross-Functional Leadership

PROFESSIONAL EXPERIENCE

55ip

Product Manager December 2023 – Present

- Led the launch of the firm's first enterprise client, driving adoption of a new exceptions-based trading system and delivering critical data and reporting solutions.
- Defined and executed product vision and strategy, aligning cross-functional stakeholders to prioritize initiatives that improved client outcomes and operational efficiency.
- Served as Scrum Master for the engineering squad, facilitating agile ceremonies, removing blockers, and accelerating delivery of high-impact product features.

Bloomberg, L.P. **2017-2023**

Portfolio & Risk Analytics Relationship Manager March 2022 – November 2023

- Acted as a strategic technology partner, leveraging product knowledge and expertise to offer functional and effective solutions for Bloomberg Portfolio Analytics clients.
- Lead existing clients through a commercial model change by coordinating with business line decision-makers, technology, operations, and legal teams to agree on new contracts, which raised recurring revenue by $800k.
- Build and maintain client relationships across the front and back office, including senior level relationships with decision makers.
- Develop and lead strategic planning for new product offering by managing resource strategy, planning product rollout, and organizing client communications.

Enterprise Portfolio & Risk Operations Team Leader August 2020 – March 2022

- Managed a team of 10+ portfolio specialists accountable for business operations support to clients by ensuring success across multiple key performance metrics
- Spearheaded new hire development by managing headcount planning, creating training content, and ensuring training consistency with global counterparts.
- Leveraged quantitative analysis to collaborate with product and engineering partners on identifying roadblocks in operational channels, developing solutions, directing implementation, and leading senior management reporting.
- Directed cross-functional global projects to address operational inefficiencies, resulting in an optimized engineering ticketing system, which led to a 50% reduction in ticket volume and decreased client response times by 25%.

Senior Enterprise Portfolio & Risk Associate September 2017 – August 2020

- Founded a new team with 5+ colleagues providing leadership to major clients through the end of a competitor acquisition and onboarding to a new portfolio analytics platform.
- Defined and implemented the team's key performance metrics, technical ticketing system, and standard operating procedures to ensure quality service delivery, which was implemented globally.
- Strategized and developed an ongoing certification program for new hires on the team by maintaining training content and ensuring individuals' success.

Fidelity Investments **2015-2017**

Relationship Manager June 2015 – September 2017

- Supported strategy planning for 3 Financial Consultants to increase high net worth client base, tracked growth opportunities, contributed to business planning activities, and supported client account retention.
- Drove business and improved profitability by keenly identifying opportunities for additional revenue through client meetings and through close collaboration with other representatives.

EDUCATION & CERTIFICATIONS

Bachelor of Arts in History/Economics, Providence College, Class of 2015
Master of Science in Applied Business Analytics, Boston University, *Expected Fall 2025*
Certifications: FINRA Series 7, 63, 65 (expired)