

# Leonardo Menezes de Souza

Strategy | Innovation | **Portfolio & Product Management**

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## SUMMARY

Executive with 15+ years of experience in portfolio governance, SAFe Lean Portfolio Management, strategic investment funding, and enterprise agile transformation across highly regulated industries such as financial services, healthcare, telecom, and government. Certified in SAFe LPM, SAFe Agilist and Prosci/ADKAR, with a proven track record of aligning funding and strategy with execution, optimizing flow, KPIs, and outcomes across portfolios exceeding US\$1B.

Core competencies: Lean Portfolio Management | SAFe LPM & Agilist | Strategy & Investment Funding | Agile Portfolio Operations | Lean Governance | Change Management (ADKAR/Prosci) | Value Stream Optimization | KPI Monitoring & Reporting | Stakeholder Engagement | Program & Portfolio Governance.

## EXPERIENCE

Advisor (CAGE / Executive Office)

07/2024 – Present

RS State, Brazil

Secretaria da Fazenda do RS

State Treasury of Rio Grande do Sul, responsible for fiscal management and tax administration.

- Led the PMO for the Profisco II Program in partnership with the Inter-American Development Bank (IDB).
- Designed and implemented value-based management frameworks, OKRs, and governance processes.
- Developed and launched an executive PMO Portal featuring real-time dashboards and knowledge base.
- Mentored government teams in portfolio management, standardizing practices (~\$1.4M in efficiency gains through process optimization and reduced project overruns).
- Key Impact: Modernizing fiscal management and strengthening governance practices at state level.

Strategy Advisor / Group Product Manager

05/2021 - 02/2024

Porto Alegre, Brazil

Unimed

Largest healthcare cooperative in Southern Brazil (695k members; \$3.2B revenue).

- Reported to CEO/Board, advising on strategy and market positioning.
- Designed and implemented corporate OKR & KPI frameworks.
- Head of Innovation & Portfolio, responsible for strategic planning, investment governance, and portfolio funding alignment. Designed the Innovation Portfolio Framework (Stage-Gate + SAFe), enabling delivery of 4 new health products, driving +22% EBITDA growth and -15% churn.
- Key Impact: Boosted financial performance and customer satisfaction, positioning Unimed Porto Alegre as an industry innovator.

Product Strategist

05/2018 - 05/2021

Brazil

Sicredi

Brazil's first cooperative financial institution (6.4M+ members, \$263B assets).

- Defined product strategy and lifecycle management (discovery → delivery).
- Released 15+ digital products; increased adoption of Woop Digital Bank App by 25% (~\$50M revenue).
- Contributed as board advisor in transformation planning and change management.
- Evaluator in Inovar Juntos Innovation Program (PUC).
- Key Impact: Expanded Sicredi's digital portfolio while strengthening product management maturity.

## Portfolio Manager & Agile Leader

05/2015 - 05/2018

Global

HSBC & Bradesco



One of the world's largest banks (60+ countries, \$2.9T assets) / Brazil's largest private bank (\$1.7T assets; 36M+ clients).

- Served as Portfolio Manager for the Banquo Program, overseeing the HSBC → Bradesco integration (US\$3B migration). Designed portfolio governance, KPI dashboards, and risk reporting, ensuring strategic alignment, FATCA/BACEN compliance, and zero critical failures in the migration of millions of accounts.
- Increased private banking portfolio by 30%.
- Spearheaded the launch of Banco Digital Next; Reduced service time by 20%.
- Co-founded Agile Community @ InovaBra, scaling Agile across 2k+ professionals.
- Key Impact: Delivered strategic digital transformation and embedded agile culture in a top-tier bank.

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## Program & PMO Manager

10/2009 - 04/2015

Latin America

Huawei



Global ICT leader (170+ countries; \$90B+ revenue).

- Led PMO War Room; mentored 30+ PMs, managed 20+ subcontracted teams.
- Managed programs & portfolios across LATAM, leading governance for mission-critical telecom programs (Vivo, Claro, Oi, TIM).
- Designed Lean Portfolio Dashboards tracking SLA, CapEx/OpEx, and flow metrics, reducing rollout time from 382 → 62 days, by implementing a proprietary process model, adopted globally (~\$120M in efficiency gains).
- Managed Brazil's first 4G station (2012) and FIFA World Cup 2014 telecom rollout.
- Key Impact: Awarded as Global Excellent PM (2012, 2013 and 2014) for operational efficiency at scale.

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## EDUCATION

MSc, Business Management (Innovation & Sustainability) - Unisinos, 2022

Postgraduate, Cooperative Financial Institutions Management - Escoop, 2021

MBA, Digital Product Leadership - TERA, 2019

MBA, Project Management - FGV, 2012

BSc, Business Administration - Unicruz, 2009

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## TRAINING / COURSES

AI Agent Manager Program - NoCodeStartup, 2025

Next frontier – AI & Data - JoinIA, 2023

Innovating in Healthcare - Harvard School of Public Health, 2023

Product Management - PM3, 2021

Product Discovery - PM3, 2021

Future-oriented teams - Aerolito, 2020

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## LANGUAGES

English: Fluent   Portuguese: Native   Chinese: Beginner

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## CERTIFICATIONS

CPA-10 | CPA-20 | PMP® | CSM® | SFC® | PMO-CP® | CAC® | SAFe SSM® | VMP®