Leonardo Menezes de Souza

Program Manager | Strategy & Analytics | Products

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SUMMARY

Program & CX Operations leader with 15+ years driving data-backed improvements across LATAM. I reduce Defect Rate (DR) and cost-to-serve through SQL-based root-cause analysis, partner with CommOps, Product and Ops to implement scalable fixes, and translate insights into executive-ready narratives that drive decisions. Proven impact on CSAT/NPS, AHT and financial efficiency; comfortable prioritizing in fast-paced, ambiguous environments. Experience with Agile (Scrum / Kanban), and User Experience (UX).

Core competencies: Customer Support Operations | Defect Rate (DR) Reduction | Root Cause Analysis (Pareto, 5 Whys) | Prioritization Frameworks | Customer Journey Mapping | Financial Efficiency & Cost-to-Serve | Data Storytelling | SQL (BigQuery/Postgres) | Looker | Tableau | Power BI | Advanced Excel | A/B Testing | CSAT | NPS | SLA | AHT | Cross-functional Delivery | Stakeholder Management | Risk & Timeline Management | Executive-Ready Narratives | LATAM Experience | Scalability & Operational Tools | Zendesk | Salesforce Service Cloud | Jira | Confluence

EXPERIENCE

Advisor (CAGE / Executive Office)
Secretaria da Fazenda do RS 🛡️   📅 07/2024 – Present   📍 RS State, Brazil

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).
- Set up RCA cadences and prioritization model (impact × cost × confidence) aligning cross-functional squads (Ops/Product/Policy).
- Built SQL/Looker dashboards linking ticket categories to CSAT and recontact rate; operationalized OKRs focused on DR reduction and cost-to-serve.
- Launched executive PMO portal with real-time DR, AHT, initiatives and savings tracking; created exec-ready narratives to drive decisions and funding.
- Delivered fixes on top 5 defect types (status updates, form errors, refund delays) *(~$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
Unimed 🌲   📅 05/2021 - 02/2024   📍 Porto Alegre, Brazil

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

- Reported to CEO/Board, advising on strategies, decision-making and market positioning.
- Partnered with CommOps, Product and Care Ops to opportunity redesign resolution flows for top contact drivers; delivering playbooks at scale.
- Translated analytical insights into executive-ready narratives and OKRs; secured funding for automation roadmap focused on DR and AHT.
- Launched 4 new digital products, one representing 5% of total revenue *(~$16M)*.
- Connected product analytics to support signals (tickets, CSAT verbatims); prioritized backlog via scoring model; AHT −12%, FCR +9pp, DR −14% QoQ.
- Increased EBITDA by 22% *(~$70.4M impact)*, improved NPS by 6%, reduced app churn by 15% *(~$45M savings)*.
- 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 transformation (Dual Track: discovery → delivery).
- Released 15+ digital products; embedded prioritization framework and A/B tests to validate support impact; accelerated time-to-mitigation +25% of Woop Digital Bank App *(~$50M revenue)*.
- Contributed as board advisor in transformation planning and change management.
- Built pipeline to connect tickets + telemetry + NPS; prioritized fixes for top friction points; cut recontacts −18%.
- Key Impact: Expanded Sicredi's digital portfolio while strengthening product management maturity.

PMO 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).

- Directed PMO for Banquo Program, HSBC → Bradesco migration; transitioned *($3B migration)* accounts with 0 data loss. Established RCA war room and playbooks, reducing service defects −20% during cutover.
- Ensured FATCA compliance and client retention; produced executive-ready narratives for risk/impact decisions;
- Scaled cross-functional operations. Increased private banking portfolio by 30%.
- Spearheaded the launch of Banco Digital Next; Reduced service time by 20%.
- Co-founded Agile Community @ InovaBra, contribute scaling Agile across 2k+ professionals.
- Key Impact: Delivered strategic digital transformation and embedded agile culture in a top-tier bank.

Program & PMO Manager 📅 10/2009 - 04/2015 📍 *Latin America*
Huawei 🔴

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

- Ran PMO War Room; standardized incident/fulfillment process and governance; mentored 30+ PMs across LATAM.
- Delivered turnkey programs for Vivo/Claro/Oi/TIM; embedded operational tools and dashboards for scale.
- Reduced SLA from 382 to 62 days by implementing a proprietary TO-BE process improvement model, adopted globally *(~$120M in meaningful efficiency gains)*.
- Managed Brazil's first 4G station (2012) and FIFA World Cup 2014 telecom rollout.
- Key Impact: Awarded 3x as Global Excellent PM (2012 - 2014) for operational efficiency and collaboration at scale.

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

TRAINING / COURSES

AI Agent Manager Program **-** NoCodeStartup, 2025

Next frontier – AI & Data - JoinIA, 2023 | Future-oriented teams - Aerolito, 2023

Innovating in Healthcare - Harvard School of Public Health, 2022

Product Management - PM3, 2021 | Product Discovery - PM3, 2021

LANGUAGES

English: Fluent   **Portuguese:** Native   **Spanish & Chinese:** Beginner

CERTIFICATIONS

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