

Jessica Davies, CFA

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Objective

To secure a position in a technology start-up so I can utilize my experience as a Wall Street analyst, researcher, strategist, and user experience designer—as well as my deep business background in finance and health care—to shape an emerging company's design practice.

Experience

2015-Present **BLUE ROCKET, INC.** ~ San Francisco, CA

Chief Strategist & UX Designer

- Analyzed and designed mobile apps across multiple industries (travel, education, transportation, law, and grocery, among others) for a fast-growing, innovative mobile app developer start-up.
- Led multiple three-day intensive workshops for new clients with emergent app ideas, which included fully evaluating and articulating: problem and solution, business strategy, marketing plan, milestones, risks, technology concerns, journey mapping, user flow, and MVP.
- Produced extensive thorough 20-30 page strategic whitepapers covering business, technology, and design aspects for each app idea.
- Conducted competitive research, user interviews, and usability studies. Create client deliverables, which included extensive written research evaluations.
- Created sketches, wireframes, and user flow for new mobile app ideas.

2015-2016 **GENERAL ASSEMBLY** ~ San Francisco, CA

UX Design Immersive & Front End Web Development Student

- Design:
 - Tier 5 | UX Design & Logo Redesign | 2 weeks | 2-person team
 - Designed two experiences for two distinct personas: real-time connections, emphasizing fast and accurate sales lead generation and real-time information for nurturing potential leads. Created a new company logo, look and feel.
 - Conducted competitive research, interviews, and design studio with our client.
 - Produced sketches, journey maps, wireframes, and click-through prototype.
 - WebMD | Healthy Living App & Wearable | 2 weeks | 3-person team
 - Created health care app and wearable generating news and information from users own biometrics and preferences chosen in the quick on-boarding process - leading to highly personalized health care information experience.
 - Produced app design, API for apple watch, and initial wearable sketches, personas, journey maps, wireframes, site maps, and click-through app prototype.
 - Beauty Cures | Epicurious for Beauty Products | 3 days | solo project
 - Developed "Epicurious" for your face. On-demand idea generator for making beauty products (masks, scrubs, etc.) with just what you have in your fridge or browse our vast recipe database for new ideas.
 - Produced app design, storyboard, sketches, wireframes, and user flow.
- Front-End Web Development:
 - 10-wk extensive program using: HTML5, CSS3, JavaScript, jQuery, GitHub, and Sublime/Atom.
 - Learned how programming and design teams collaborate create innovative websites.

- Built – from scratch – a fully interactive website.

2013-2014 **VICTORY HEALTHCARE** ~ The Woodlands, TX

Director of Strategy & Investor Relations

- Serve as investor/banking spokesperson for profitable, fast-growing, innovative healthcare start-up, an 8+ surgical hospital health system.
- Worked closely with management team CEO, CFO, and COO on various banking, finance, and operations challenges within the company.
- Key part of the M&A team responsible for hospital acquisitions, sales, and de novo projects. Participated in the negotiations, lead due diligence, and created 5-year proformas.
- Completely redesigned corporate investor presentation to communicate the Victory story to bankers, partners, and private equity. Used personal contacts to organize and present to 25 banks over two days at January 2014 JP Morgan Healthcare Conference.
- Evaluated various banking/credit opportunities at both the facility and corporate level.
- Lead project to evaluate and modify Victory's charge master, worked with revenue cycle team, created daily presentations for senior management to generate buy-in.
- Analyzed merger of two facilities. Coordinated with clinical, HR, and operations personnel. Created proformas, presentations, analyzed and recommended staffing reductions.
- Developed quarterly investor presentations for physician partners at each facility.
- Evaluated risk management program and coordinated insurer due diligence; changed insurers, generating a savings of over \$0.5 million annually.

2012-2013

WWE ~ Stamford, CT

Director, Investor Relations

- Served as institutional investor spokesperson for profitable, diversified, \$600M+ media company.
- Independently organized and performed outreach meetings with top 25 holders and sell-side analysts to gauge investor perception and improve investor-company relations.
- Created targeting strategy, calls, and non-deal road shows to develop markets in: Northeast, Midwest, West Coast, Europe, and Asia. Targeted media experts and value funds.
- Organized all elements of investor conferences: presentation development and prep, presentation notes, Q&A, one-on-ones, banking meetings, and investor follow-up.
- Worked cross-functionally with multiple business units to create and maintain an earnings process with solid deadlines, including: conference call scripts and earnings press releases (both linked via web filings), earnings presentations, expected Q&A, and supporting materials.
- Developed social media strategy and ran daily operations for the most widely followed IR-specific social media accounts.
- Revamped IR website to be more investor focused, user friendly, and social media savvy.
- Redesigned investor presentation to be concise and easily understandable by both buy-side media experts and generalists. Reduced slide count, elaborated narrative, highlighted core business, introduced future growth strategy, and reduced the noise around one-time issues.
- Collaborated closely with media relations to develop messaging for major business transactions.
- Prepared IR-related board materials.

2009-2013 **CONSILIUM GLOBAL RESEARCH** ~ New York, NY

Senior Equity Analyst & Investor Relations Consultant

- Composed detailed sell-side research reports for small- and micro-cap companies.
- Drafted detailed investor presentations for client companies, including: corporate overview, market analysis, technology and product assessment, clinical data, business model, incentive

- alignment, sales strategy, financials, and short- and long-term catalysts for stock appreciation.
- Redesigned client company websites and social media strategies, resulting in increased usability and improved information gathering for all users, including: investors, vendors, and consumers.
- Key relationship manager for senior management, including: CEOs, CFOs, and R&D directors.
- Created and executed press releases and pitches to drive interest to client companies from reporters, investors, and buy- and sell-side analysts.
- Developed detailed CGR marketing plan, including: target market estimates, competitive analysis, presentations, social media, partnering, and advertising strategies.

2002-2008

ROCHDALE INVESTMENT MANAGEMENT ~ New York, NY

Senior Healthcare Equity Research Analyst & Mutual Fund Portfolio Manager

- Analyzed companies (for \$2.6B asset manager) of all sizes and market sectors including: healthcare, technology, industrials, waste management, energy, and retail.
- Created healthcare long/short mutual fund: developed fund strategy, composed prospectus, created budget, constructed trading guidelines, and presented at investor and sales meetings.
- Managed over \$70M in long-only client accounts and a long/short product.
- Created detailed financial and market models for all companies under coverage.
- Constructed company valuations based on projected financials/DCF and relative valuation.
- Identified undervalued companies by assessing industry and company fundamentals via company visits, trade shows, industry contacts, and clinical research evaluation.

2001-2002

GOLDMAN, SACHS & CO. ~ Boston, MA

Associate Analyst, Global Investment Research, Medical Devices

- Maintained coverage of securities in the medical technology sector.
- Performed primary research and analysis: conducted surveys, communicated with university researchers and physicians, visited companies, and developed financial and market models.
- Communicated investment recommendations to institutional clients and Goldman Sachs's sales force via research reports, First Call notes, meetings, and healthcare conferences.
- Performed due diligence for investment banking clients, including \$130 million IPO.

2000-2001

ING BARINGS LLC ~ New York, NY

Associate Analyst, Equity Research, Medical Devices

- Assisted senior analyst in covering the medical technology segment.
- Participated in banking engagements, including private placements and M&A.

1999-2000

COLUMBIA CORNELL CARE LLC ~ New York, NY

Associate Director of Network Development

- Developed and maintained network of over 3,000 physicians for innovative healthcare start-up.
- Negotiated and drafted managed-care risk contracts and designed associated funds flow models.

1997-1999

ERNST & YOUNG LLP ~ Boston, MA

Senior Consultant, Healthcare

- Developed narrative and financial forecasts for feasibility studies used to support \$26-156M bond offerings.
- Prepared consolidated forecast financials for major merger of three hospitals in New York: evaluated debt capacity, examined current management initiatives, and assessed potential for merger synergies.
- Negotiated managed care contracts with New England's largest payor for PHO.

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1996-1997 **DELOITTE & TOUCHE LLP** ~ Boston, MA

Consultant, Healthcare

- Audited settlements, IBNR, and cost reports for publicly traded HMOs.
- Developed operating budget for community healthcare provider; eliminated \$6 million deficit.

Education

2015-2016 **General Assembly** ~ UX Design Immersive ~ San Francisco, CA

1994-1996 **Harvard University** ~ M.S. Health Policy & Management ~ Boston, MA

1991-1994 **University of California at Berkeley** ~ B.A. Psychology ~ Berkeley, CA

UX Design Methods

Competitive analysis, comparative analysis, heuristic evaluation, user research, survey creation, interviews, guerrilla research, body storming, design studio, ideation, site mapping, personas, user flows, wireframes, rapid prototyping (paper as well as low-, medium-, high-fidelity digital), content strategy, and usability testing.

Technological Proficiencies

UX Design: Sketch, Omnigraffle, InVision, Pop, Keynote, and iWork. Web Development: HTML, CSS, Java Script, Atom, Sublime, GitHub, and Firebase. Finance: Barra, Bloomberg, FactSet, ThompsonOne, FirstCall, StreetEvents, Ipreo (CRM/Big Dough), TM1, and WebFilings. Social Media & Other: Slack, HootSuite, Twitter/TweetDeck, Facebook, YouTube, Vimeo, Contribute, Squarespace, WordPress, blogging, iMovie, and video/short film production. Others: Microsoft Word, Excel, PowerPoint, Access, Moodle, Rosetta Stone, and Zentangle.

Languages & Community Involvement

Native, professional proficiency in English, conversational Spanish, and beginning Portuguese. Developed social media strategy for Teatro SEA (New York's only bilingual Latino children's theater). Redesigned website and social media strategy for New York's Literacy Assistance Center. Raised funds for literacy and participated in publishing industry program committee for the Book Industry Guild of New York. Trained and volunteered as ESL (English as a Second Language) teacher.