**FRB Accomplishments**

**1. Stakeholder Relationship Building**

* Cultivated robust relationships with Chase Marketing stakeholders, garnering recognition for collaborative teamwork and adaptability.
* Hosted 10+ sessions with cross-functional teams, encompassing legal, risk, compliance, and marketing, discerning and incorporating diverse needs into communication strategies.

**2. Iterative Communication Refinement**

* Led the refinement of critical communications for business banking lending customers undergoing Line of Credit transitions, incorporating iterative feedback from 5+ Chase teams across 9 iterations.
* Participated in over 20+ working sessions outside the communications scope, enriching understanding and improving customer-centric communication strategies.

**3. Strategic Reporting and Decision Support**

* Provided indispensable weekly updates to the Managing Director of the Communications Task Force (CTF), facilitating informed decision-making and operational planning.

**4. Personal Achievement**

* Pioneering Role as the Bridge between lending and Communications:
* Explored uncharted territories within marketing, business banking, and lending domains, swiftly becoming a conduit between lending teams and the Communications Task Force.
* Facilitated clear and concise communication, enabling comprehensive planning and seamless execution for both entities throughout the transition.

**Streamlined Communications for Acquired Bank Customers:**

* Developed a strategic approach leading to the successful creation and deployment of targeted communications for acquired bank customers, encompassing:
  + Business Term Loans
  + Business Lines of Credit
  + New Business Lending Originations
* Coordinated 30+ key tasks and 8 milestones, ensuring precise alignment with product transition timelines.

**2. Interdisciplinary Collaboration and Synergy:**

* Orchestrated synchronization of communications and marketing strategies across 3000+ business banking lending accounts, fostering a seamless experience for customers during the transition.
* Engaged with various business banking products to align messaging, enhancing customer experience, legal compliance, and business efficacy.

**3. Navigated Complexity and Adaptability:**

* Analyzed intricate details from diverse lending product teams, rapidly grasping new subject matter, terminologies, and nuances.
* Devised agile communications timelines adaptable to evolving transition scenarios, ensuring timely and accurate delivery.

PMaaS  
**H1 Key Achievements**

* Recalibrated PMaaS go-to-market strategy and approach by revamping core material, creating reusable pursuit material, and developing a product operating model specific POV.
* Conducted a 4-week internal PMaaS research project to evaluate and assess 24 Product Management Tools across 7 metrics, 5 user personas, and by steps in the Product Development Lifecycle.
* Completed the first external engagement implementing the PMaaS Digital Agile Playbook where we sold and globally adapted the Playbook with an EY-UK team working for H&M over an 8-week period.
* Developed tentative class schedule and topics for four "Advanced Product Management (AMP)" training to be held in Spring 2023. Synthesized Product Management Playbook and materials from previous engagements to identify gaps in class materials and create a skeleton deck for each class.

**H2 Targets**

* Complete a Product Management Tooling POV outlining pros and cons of each tool, key differentiators, effective tooling combinations, and opportunities in the market.
* Refine and improve key sections of the playbook based on client work from Citi, JPMC, and the UK H&M Team. These sections include Product Strategy, Product Development Lifecycle, and Metrics.
* Develop and publish PMaaS white-paper on implementing product and journey-led operating models based on our experiences and research across the Financial Services industry.
* Complete training materials and lesson plans and officially launch Advanced Product Management training the course.