

INDEX PRODUCT MANAGER

Skills

Bloomberg, content, client, clients, customer service, customer support, edit, external audits, Fixed Income, focus, functional, marketing and research, marketing, meetings, personnel, presentations, reporting, sales, strategic, training materials

Experience

08/2016 to Current

Index Product Manager Beecher Carlson i/4 Atlanta , GA

- Oversee integration of customer support system from Barclays to Bloomberg (Barclays Fixed Income Index franchise acquired by Bloomberg in Aug.
- 2016).
- Develop comprehensive training materials and presentations for effective transition of the business post-acquisition.
- Train and manage Bloomberg Analytics Desk personnel.
- Collaborate with engineering, sales, product and analytics teams to ease transition of data and clients to a new firm.
- Delegate work across different functional areas to achieve successful customer service and satisfaction.
- Create, edit and publish marketing and research content around product.
- Create presentations, and planned marketing efforts for advisory events that host priority business stakeholders.
- Grow and maintain client relationships, with a focus on large investors or executives with strong affiliations to the business.
- Hold client meetings and conference calls to provide custom solutions and upsell product offerings.
- Strategize technological innovations based on user insights to improve and simplify user experience.
- Conduct product demos for new and existing clients.

10/2015 to 08/2016

Research and Marketing Analyst Hightower Advisors i/4 Westport , CT

- Promoted and strengthened Barclays Index brand through consultative client work on bespoke solutions, marketing of new products, and writing supplementary literature.
- Designed, implemented and marketed numerous index launches.
- Developed extensive knowledge of Barclays proprietary analytics platform in order to sell product and set up licensing agreements.

09/2014 to 10/2015

Risk Analyst Hightower Advisors i/4 Chicago , IL

- Implemented Barclays' strategic reporting systems and ensured adherence to compliance standards.
- Project Managed the development and user acceptance testing of the reporting framework enhancements, and tracked defects and exceptions relating to the process.
- Executed projects, partnering with multiple department to coordinate deliverables for external audits pertaining to risk and control.
- Established best practices through cross-department meetings and produced training content for all relevant parties in a given project.

06/2013 to 08/2013

Wealth Management Analyst Hightower Advisors i/4 New York , NY

- Contributed in strategic and tactical asset allocation for a group of ultra-high net worth private clients.
- Created and managed portfolios for clients after obtaining their investment objectives and risk tolerance from in-person meetings.

Education and Training

Bachelor of Business Administration : Finance MIS and Accountancy Villanova University i/4 City , State Finance MIS and Accountancy