

# Greg Welliver, CFA

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linkedin.com/in/greg-welliver/ · github.com/topgreg

## Summary

Data-driven, strategic thinker with blend of experience in data science, analytics, product management, and management consulting. I've been fortunate to have worked on a variety of customer archetypes (B2B, B2C, and B2B2C) and different environments (tech, financial services, consulting). Company culture is paramount to me - I actively cultivate an environment where people can perform their best and have fun (ask me about my "dad" jokes).

## Data Scientist

2022 – Present

Springboard - Data Science Career Track

- Rounding out my data science skillset with Springboard's intensive curriculum, focusing on python, SQL, data collection and exploration, statistics, machine learning, feature engineering and more

## Lead Product Manager

2021 – 2022

DoorDash

- Introduced multiple innovative growth tactics that increased rate of monthly adoption by 20%+ for DoorDash's New Verticals (e.g. Convenience, Grocery)
- Collaborated closely with data science team to define objectives and gather key insights to support strategic decisions

## Lead Product Manager

2020 – 2021

Bond Financial Technologies (Series A FinTech backed by Coatue, Goldman Sachs, Mastercard)

- Led first iteration of Bond Data, OS Platform, and Comply products; drastically improved efficiency in onboarding customers and launching programs
- Partnered with data science team to define requirements for sophisticated customer reporting

## Director of Product Management

2019 – 2020

Tesorio (Series A FinTech backed by Madrona, First Round, Y Combinator)

- Drove the launch of the Tesorio Payments Platform from concept to delivery; processed over \$1 million in payment volume in first six months after launch
- Conducted pricing research using combination of qualitative and quantitative (Maxdiff, Conjoint) methods

## Director of Product Management

2018 – 2019

Napster Group

- Owned the overall product direction, execution, and go-to-market strategy for Napster's B2B (SaaS, API, PaaS) product offerings
- Partnered with data science team to identify product opportunities to improve profitability of subscription services

## EDUCATION

*Columbia Business School*  
M.B.A.

*Carnegie Mellon University*  
Primary Major:  
B.S. in Economics  
Additional Major:  
B.S. in Business  
Administration

*CFA Institute*  
CFA charterholder

## SELECTED NOTES ABOUT ME

· Avid guitar player (unfortunately a mediocre singer) and photographer  
· Carnegie Mellon Men's Varsity Soccer Team; currently assistant coach to Daughter's soccer team

## LAST BOOK I READ

Never Split the Difference: Negotiating As If Your Life Depended On It by Chris Voss

## LAST MOVIE I SAW

In & Of Itself

## FAVORITE CITIES I'VE VISITED

Florence, Copenhagen, Kyoto

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## Senior Manager - Business Analytics & Operations

2016 – 2018

PayPal

- Drove intensive study of merchant transaction economics; analysis magnified ROI of investments by 25%
- Redefined customer segmentation framework leveraging large datasets, enhancing ability to align customer segments with campaign tactics

## Senior Vice President - Cards & Global Digital Payments

2013 – 2016

Citigroup

- Provided regular reporting on trends in business which frequently identified ad hoc opportunities for deeper analysis
- Conducted market research and competitive analysis to drive strategic decision making for Global Cards

## Management Consultant – Consumer Finance Group

2010 – 2013

PricewaterhouseCoopers

- Orchestrated market analysis to provide strategic recommendations to clients
- Evaluated the operations of clients, and designed implementation plans to improve organizational processes, structure, and technical capabilities

## Research Analyst - Commercial Banks

2008 – 2010

Raymond James Financial

- Synthesized market data to author thematic industry reports, create earnings models, and provide investment recommendations
- Provided lead coverage on \$1.9 billion Capital Federal Financial second-step conversion

## Research Analyst – Specialty Finance

2006 – 2008

Macquarie Group

- Created comprehensive loss models for loan portfolios of companies ranging up to \$330 billion in assets
- Provided lead coverage on \$17.9 billion Visa IPO, the largest IPO in U.S. history (at the time of IPO)

## Consultant

2006 – 2006

FactSet Research Systems

- Scoped, designed and implemented products for clients, including tools for research, publishing, reporting, and accessing databases

## TECHNICAL

SQL, Python, Jupyter Notebook, sklearn, git, A/B testing, Microsoft Office Suite, Google Workspace, Jira, Amplitude, Tableau, Heap, Slack, Trello, Google Analytics

## ONLINE COURSEWORK

Springboard Data Science Career Track □ AWS Training & Certification: What is Artificial Intelligence? □ What is Machine Learning? □ ML Algorithms Explained □ ML Terminology and Process □ ML for Leaders □ What is Deep Learning □ AI For Everyone (Coursera)

Growth Hacking with Digital Marketing (Udemy) □ The Complete Growth Hacking & Conversion Course (Udemy) □ Digital Marketing Masterclass 2018 (Udemy)