

# ISE LUND

## Senior Technology Transformation Leader

(415) 939-8975 Ise@PLInteractive.com

### PROFILE

Expert data-driven technology delivery leader bringing 15+ years' experience driving transformation through program- and systems-optimization strategies that increase client and employee satisfaction, engagement, and return on investment.

### CORE COMPETENCIES

- Project and program delivery management
- Business case development
- Technology strategy and ROI analysis
- Agile development/Scrum (Jira/Confluence)
- Product delivery roadmaps
- Data analysis, analytics
- Financial management best practices

### AREAS OF EXPERTISE

- Omnichannel personalization leveraging AI, ML
- Role-Based Access Control (RBAC)
- Sales and marketing automation (Marketo)
- Customer privacy and cookies (OneTrust)
- Customer Identity Management/CDPs
- Access management (SSO, Ping, ServiceNow, SailPoint)
- Identity and Access Management (IAM)
- Consent management and governance (GDPR, CCPA)
- Regulatory compliance, risk mitigation (SOX, HIPPA, PII standards)

### EDUCATION

Harvard University & University of California, Los Angeles

### EXPERIENCE

#### **Silicon Valley Bank, Technology Delivery Consultant 2020-2023**

Regulatory compliance systems integration:

- Assessment of the MarTech stack for data optimization for regulatory compliance
- Vendor analysis, business case rationalization, resource planning, strategic approach

IAM MRA remediation and project management:

- Drive strategic remediation to ensure future compliance with LFI regulatory and risk mitigation standards

RBAC project management for IAM:

- Conduct RBAC organizational readiness discovery and existing systems analysis (Workday, SailPoint, ServiceNow)
- Create business requirements, Agile program implementation plan, and secured vendor resources for application onboarding into SailPoint, role modeling, provisioning/deprovisioning

Led technical strategy and systems integration for SVB's Global Privacy Program:

- Drive consent management automation technical solution strategy, including product vision, use case architecture, systems integration requirements, and resource plan.
- Facilitate global cookie consent technical integration across SVB online properties, leveraging Agile best practices and OneTrust to ensure compliance with GDPR, CCPA, and DPL regulatory guidelines

#### **Wells Fargo, Personalization Technology Strategy Consultant 2018-2020**

Customer identity management product and technology strategy to enable real-time data-based omnichannel personalization:

- Lead assessment of marketing technology solutions that leverage machine learning/AI to deliver personalized messaging to the right person at the right time and in the right channel

- Evaluate Customer Data Platform vendors to deliver customer identity management, profile enhancement and data resolution in real time to drive next-best actions and ensure compliance with privacy-related legal and regulatory and governance mandates including GDPR, CCPA, ITP

**U.S. Bank, *Digital Strategy Consultant* 2017-2018**

Digital strategy and technical implementation for Wealth Management AI/ML robo advisor:

- Create program strategy and implementation plan for U.S. Bancorp Investment's robo-advising product, Automated Investor

**Great Place to Work, *Sales & Marketing Technology Consultant* 2015-2016**

Create strategic marketing technology plan for qualifying and nurturing leads, and increasing sales of workplace culture advisory services for the creators *Fortune* 100 Best Companies to Work For® list:

- Drive technical implementation of sales funnel optimization strategy
- Implement campaign back-end based on target demographics and behavioral triggers to score high-quality leads and inform the strategy for their ongoing nurture
- Create high-conversion lifecycle content marketing technical implementation strategy to build brand recognition and increase multi-product sales

**Wells Fargo, *Technical Strategy & Product Marketing Consultant* 2011-2014**

Lead product marketing for the Make an Appointment service:

- Create product roadmap and metrics for success for this service that allows consumers to make an appointment at a branch and time convenient for them, as well as giving bankers the opportunity to prepare for the customer's specific needs
- Successfully rolled out the service across the US with new accounts and financial review being the top two most requested appointments, representing the greatest opportunity for revenue generation

**Levi Strauss & Co., *Digital Technology and Sales Strategy Consultant* 2009-2010**

Drive digital sales strategy for Holiday, Super Bowl and Father's Day campaigns.

- Create digital strategy for Dockers' "Wear the Pants" rebranding campaign, including strategic tie-ins to social media, Super Bowl TV spot, paid online media and earned media
- Selected and managed vendor to support multi-state sweepstakes compliance
- Worked with technology partners to accommodate Super Bowl traffic load and backup plans
- Quadrupled Dockers' email database, "dockers" achieved #1 and #2 search terms in all of Google for days surrounding Super Bowl promotion, doubled daily sales on consistent basis, increased Facebook fan base from 100 to 12,000

**Blue Shield of California, *Online Sales and Marketing Consultant* 2007-2009**

Create lifecycle online marketing and sales optimization strategy, and managed the implementation of the Blue Shield prospect website search engine optimization and multivariate testing program.

- Build online sales and marketing strategy and implemented analytics to optimize the online sales funnel
- Author prospect site social media strategy, identified KPIs to monitor SEO program effectiveness & trained key permanent staff; cut acquisition costs 50%

**Charles Schwab & Co., Inc., *Interactive Marketing Strategy Consultant* 2005-2008**

Strategize technical and product integration, interactive marketing plan and provided program management for Charles Schwab retail brokerage and bank offerings.

- Effectively define and streamline technical integration strategy to bring all Schwab offerings under a single Schwab.com online domain
- Successfully implemented program for search engine optimization, improving visibility 8x
- Provide interactive marketing roadmap for dynamic content and prospect personalization to increase acquisition ROI.