

Natalie Morrison

Senior Program Manager

Phone: (206) 555-0147
Address: Seattle, WA 98101
Website: <https://linkedin.com/in/nataliem>
Email: natalie.morrison@email.com

- Strategic Program Manager with 10+ years driving enterprise technology transformation programs in financial services and healthcare sectors, specializing in cloud migration initiatives and regulatory compliance programs
- Proven track record orchestrating programs up to \$12M across distributed teams spanning multiple geographies, translating complex technical requirements into executive-level strategy while delivering measurable business outcomes
- Expert in establishing program governance frameworks, managing cross-functional dependencies, and influencing strategic roadmaps across Engineering, Product, Operations, and Business stakeholder groups

PROFESSIONAL EXPERIENCE

Fidelity Investments

March 2020 – Present

Senior Program Manager

Lead enterprise-scale technology programs for the Wealth Management division, managing portfolio of initiatives supporting 8M+ customer accounts and \$2.3T in assets under management

- Directed \$8.5M cloud infrastructure modernization program spanning 7 concurrent projects across Platform Engineering, Security, Data Analytics, and Customer Experience teams, coordinating 45+ cross-functional resources across Boston, Durham, and Bangalore to deliver unified AWS migration 5 weeks ahead of schedule, resulting in \$3.2M annual cost savings and 42% improvement in application performance
- Established executive program governance framework and steering committee cadence for technology portfolio, providing data-driven insights that influenced \$15M in annual investment allocation decisions, redirecting resources from underperforming legacy initiatives to strategic digital transformation priorities
- Orchestrated regulatory compliance program addressing SEC custody rule modernization across 5 business units, managing dependencies between legal review, system modifications, operational procedure updates, and audit preparation workstreams, achieving 100% compliance certification with zero findings during regulatory examination
- Led agile transformation initiative across 6 product development teams, implementing SAFe framework and establishing Program Increment planning cadence, resulting in 38% reduction in time-to-market for new features and 55% decrease in cross-team blocking dependencies
- Designed and implemented program management office standards and templates adopted across 12-person PMO organization, reducing program reporting overhead by 35% while improving executive visibility into portfolio health, risks, and strategic alignment

Kaiser Permanente

June 2017 – February 2020

Program Manager

Managed healthcare technology programs supporting clinical operations across Northern California region serving 4.5M members

- Directed \$4.2M Epic EMR integration program coordinating 8 concurrent implementation projects across 15 medical centers, aligning cross-functional teams spanning Clinical Operations, IT Infrastructure, Training, and Change Management to deliver unified patient records system, resulting in 28% improvement in clinical documentation time and 99.2% user adoption within 6 months
- Managed HIPAA compliance and data privacy program across technology portfolio, establishing governance processes and conducting risk assessments for 12 major system initiatives, ensuring zero compliance violations during 18-month program duration and achieving "exceeds expectations" rating in external privacy audit
- Orchestrated telehealth platform expansion program spanning technology implementation, provider training, patient communication, and regulatory approval workstreams across 8 specialties, enabling 250K+ virtual visits in first year and improving patient access scores by 34%
- Established dependency management framework and cross-program coordination rituals for healthcare IT portfolio, reducing schedule conflicts between concurrent initiatives by 60% and improving resource utilization efficiency by 25%

Accenture

August 2014 – May 2017

Project Manager / Program Manager

Progressed from Project Manager to Program Manager role, delivering technology consulting engagements for Fortune 500 clients in financial services sector

- Promoted to Program Manager (January 2016) based on demonstrated ability to manage increasing scope and stakeholder complexity across multiple client engagements
- Led digital banking transformation program for regional bank client spanning mobile app redesign, API integration, legacy system modernization, and organizational change management across 4 concurrent projects with \$3.8M budget, delivering 3 months ahead of contractual timeline and achieving 96% client satisfaction score
- Managed cross-functional program team of 28 consultants, client staff, and offshore development resources across 3 time zones, establishing communication protocols and decision-making frameworks that reduced escalations by 45% and improved delivery predictability
- Contributed to Accenture's program management methodology development, authoring best practices documentation for distributed team management that was adopted across North America Financial Services practice

Wells Fargo

July 2012 – July 2014

Associate Project Manager

Supported enterprise technology initiatives within Corporate Technology division

- Coordinated payment processing system upgrade project affecting 12M+ customer accounts, managing vendor relationships, technical workstreams, and business stakeholder communication throughout 14-month implementation
- Supported program manager on regulatory compliance initiative spanning 6 technology projects, maintaining integrated program schedule, tracking cross-project dependencies, and preparing executive status reporting

SKILLS

Program Management Methodologies

SAFe Program Management, Agile/Scrum, Waterfall, Hybrid Delivery Models, Portfolio Optimization, Cross-functional Program Delivery, Strategic Roadmapping, Dependency Management, Risk & Issue Management, Program Governance, Change Management (Prosci), Earned Value Management

Tools & Platforms

Jira, Azure DevOps, Smartsheet, MS Project, Confluence, Monday.com, Tableau, PowerBI, ServiceNow, Slack, Microsoft 365 Suite

Business & Strategic Capabilities

Executive Stakeholder Management, Business Case Development, Financial Analysis & Budget Management, Vendor & Partner Management, OKR Framework, Resource Capacity Planning, Organizational Change Leadership, Influence Without Authority

Domain Expertise

Cloud Migration (AWS, Azure), Financial Services Technology, Healthcare IT, HIPAA Compliance, SEC Regulatory Requirements, API Integration, Enterprise Architecture, Data Privacy & Security

EDUCATION

University of California, Berkeley - Haas School of Business

May 2017

Master of Business Administration (MBA)

Concentration: Technology Management and Strategy

University of Washington

June 2012

Bachelor of Science in Business Administration

Major: Information Systems

Honors: Magna Cum Laude (GPA: 3.8/4.0)

CERTIFICATIONS

Program Management Professional (PgMP)

2019

Project Management Professional (PMP)

2016

Project Management Institute

SAFe Program Consultant (SPC)

2021

Scaled Agile

Certified Scrum Master (CSM)

2018

Scrum Alliance

AWARDS AND RECOGNITION

Program Excellence Award

2022

Fidelity Investments

Recognized among top 5% of program managers enterprise-wide for delivering cloud migration program 5 weeks ahead of schedule while achieving \$3.2M cost savings and maintaining zero security incidents during transition

Client Partnership Award

2017

Accenture Financial Services

Honored for exceptional stakeholder management on digital banking transformation engagement, achieving 96% client satisfaction score and securing \$2.1M contract extension based on program delivery excellence

Innovation Champion Award

2019

Kaiser Permanente

Awarded for implementing cross-program dependency management framework that reduced schedule conflicts by 60% and was subsequently adopted as standard practice across healthcare IT portfolio

PUBLICATIONS AND SPEAKING

"Managing Regulatory Compliance in Healthcare Technology Programs: Lessons from Epic EMR Integration"

September 2019

PMI Healthcare Community of Practice Newsletter

Featured article, 3,200+ downloads

"Scaling Agile Across Distributed Financial Services Teams"

October 2021

PMI Global Conference, Philadelphia

Presentation, Audience: 250+ program management professionals

"The Hidden Cost of Poor Dependency Management in Enterprise Programs"

March 2023

LinkedIn Article Series

3-part series, 18,500+ views, republished in PMI Program Management Insights newsletter