

# Claudia D. Reid

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## Professional Summary

Published author and senior business consultant with 20+ years of leadership across project management, digital transformation, and compliance-driven operations. Expert in enterprise AI adoption, SaaS/CRM implementations, data analytics, UX research, and automation strategy. Skilled in Power BI, Salesforce, ServiceNow, API integrations, DevOps, and data warehousing. Proven ability to deliver complex, cross-functional programs on time and within budget while ensuring strict regulatory compliance (Dodd-Frank, CFPB, TRID, RESPA). Recognized for PMO strategy, governance, and data-driven business innovation.

## Core Competencies

- **Project & Program Leadership:** PMO strategy, governance, change management, stakeholder engagement
- **AI & Digital Transformation:** Generative AI, automation integration, analytics, UX research, data warehousing
- **Enterprise Platforms:** Salesforce, ServiceNow, SaaS/CRM rollouts, API integrations, DevOps, cloud migration
- **Compliance & Risk:** Dodd-Frank, CFPB, TRID, RESPA, underwriting, regulatory audits
- **Finance & Operations:** Mortgage processing/underwriting, financial modeling, supply chain optimization, vendor management
- **Additional Strengths:** Process improvement, technical documentation, knowledge management, training & mentoring

## Professional Experience

### Published Author & Independent Business Consultant

Self-Employed • 2021–Present | NYC Metro / Pittsburgh, PA

On-site • Hybrid • Freelance

- Published author in PMO strategy, project management, and business consulting; recognized for thought leadership in AI, digital transformation, and enterprise innovation.

- Led enterprise AI transformation initiatives, SaaS/CRM rollouts, and compliance alignment for scaling organizations.
- Delivered strategic consulting across logistics, finance, and digital systems, improving operational efficiency and compliance.
- Designed AI-driven solutions, optimized workflows, and supported business growth through automation and process redesign.

## Senior Business Consultant / Project Manager

McReid Project X (Freelance) • 2022–2024 | Pittsburgh, PA / Queens, NY

- Delivered business analysis, AI integration, automation strategy, and process optimization for diverse client organizations.
- Managed cross-functional teams, documentation, knowledge management, and change management initiatives.
- Provided regulatory and compliance expertise (Dodd-Frank, CFPB, data protection), financial modeling, and risk assessment.

## System & Store Operations Manager

Giant Eagle, Inc. • March 2022 – November 2022 | Pittsburgh, PA

- Launched a flagship urban store on schedule and **6% under budget**, overseeing buildout, POS deployment, and supply chain integration.
- Implemented AI-driven inventory forecasting, reducing stockouts **34%** and shrinkage **21%**.
- Trained 60+ staff on digital tools and customer experience, increasing NPS from **72 to 89**.

## Mortgage Processor

Northwest Bank • April 2021 – March 2022 | Pittsburgh, PA

- Processed 200+ conventional and government loans using Encompass and DU/LP with a **98% compliance audit pass rate**.
- Reduced loan cycle time from **28 to 19 days** through workflow automation and borrower self-service tools.
- Mentored junior processors on TRID timing and credit exception handling.

## Project Manager (Technology & Operations)

Fiserv • January 2021 – March 2021 | Queens, NY / Pittsburgh, PA

- Directed a core banking system upgrade for 12 credit unions, migrating **1.2M accounts** to a cloud-native platform.

- Led UAT with 40+ stakeholders, achieving **100% go-live success** with zero critical defects.
- Authored a real-time payments integration whitepaper adopted as an internal training standard.

## **Mortgage Processor / Underwriter**

Wells Fargo • 2012 – 2020 | Orange Park, FL

- Underwrote **\$450M+** in residential loans (FHA, VA, USDA, Jumbo) with **<1% repurchase rate**.
- Piloted AI-assisted document classification, reducing review time **40%**.
- Served as compliance lead for Dodd-Frank and RESPA audits; trained 30+ team members.

## **Publications & Additional Highlights**

- Author of works on PMO strategy, project management, AI/cloud integration, fintech AI mastery, and transformation methodologies (Amazon Kindle & other platforms).
- 20+ years aligning regulatory compliance, digital adoption, and business growth across finance, retail, logistics, and technology sectors.

## **Education & Certifications**

- **AAS, Business** — TCI Technical Career Institutes, Manhattan, NY
- **Striven Software LLC** — Cloud Migration, Cybersecurity Fundamentals
- **Digital Marketing School** — Artificial Intelligence in Business (2023)
- **Florida School of Real Estate** — Licensed Sales Associate (Expired)