

ERICK CLARK, MBA, M.S., PMP, PSM

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Location: Houston, Texas

PROFESSIONAL SUMMARY

Technology strategy and operations executive with 15+ years leading enterprise transformation, portfolio governance, AI strategy, financial planning, and operating-model execution across regulated industries. As Chief of Staff for JPMorgan Chase Legal Technology, shaped annual strategy, AI investment priorities, product governance, and workforce planning for a seven-product global portfolio supported by \$24.9M-\$36.2M in annual labor investment and approximately 164 employees. Founder and AI product strategist building human-in-the-loop solutions across healthcare, regulatory intelligence, and career technology. Trusted advisor to senior Legal and Technology executives who converts enterprise priorities into investment decisions, accountable roadmaps, and measurable outcomes.

KEY SKILLS

- Enterprise Strategy & Annual Planning
 - Chief of Staff & Executive Governance
 - AI Strategy, Governance & Product Adoption
 - AI Product Strategy & Human-in-the-Loop Design
 - Product Operating Models
 - Portfolio & Investment Governance
 - Financial & Workforce Planning
 - Organizational Transformation
 - Risk, Controls & Privacy
 - Executive Communications
 - Global Cross-Functional Leadership
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PROFESSIONAL EXPERIENCE

JPMorgan Chase

Vice President, Chief of Staff (Strategy & Execution) – Legal Technology & Resiliency Technology

Houston, TX | 2019 – Present

- Owned Legal Technology's annual strategy cycle and multi-year roadmap, translating enterprise Legal, Technology, and business priorities into portfolio objectives, product roadmaps, investment decisions, workforce plans, and measurable execution commitments across seven products.
- Served as the strategic advisor responsible for executive communications to JPMorgan's General Counsel and senior Technology leadership, developing annual strategy presentations, quarterly business reviews, monthly operating reviews, portfolio dashboards, AI updates, financial analyses, and executive narratives that shaped investment priorities and execution across the Legal Technology organization.
- Developed and operationalized the Legal Technology AI strategy, establishing the AI book of work, governance model, use-case prioritization, adoption and ROI measures, and executive reporting across LLM assistants, knowledge and analytics platforms, document automation, and AI-enabled legal workflows.
- Established the annual OKR framework for Legal Technology, partnering with executive leadership to translate strategic priorities into measurable objectives, quarterly outcomes, portfolio commitments, and executive

performance reviews.

- Led the redesign of the product operating model, rationalizing nine products to seven and defining product taxonomy, ownership boundaries, decision rights, and governance to strengthen accountability and strategic alignment.
- Directed annual financial and workforce planning for a \$24.9M-\$36.2M labor portfolio supporting approximately 164 employees; challenged forecasts, set headcount and location guardrails, shaped reduction scenarios, and advised leaders on capacity, hiring, attrition, and investment tradeoffs.
- Led through influence across product, engineering, architecture, UX, SRE, agility, finance, risk, and Legal teams to align roadmaps, resolve enterprise dependencies, strengthen portfolio governance, and maintain execution against strategic priorities.
- Directed annual risk, control, and privacy readiness, clarifying accountability for AI/ML-related business cases and driving governance, re-attestation, assessment, and remediation activities.
- Sponsored application and infrastructure modernization initiatives that increased scalability by 30% and reduced technology costs by \$3M through AWS cloud integration.

MY PERSONAL AI PRODUCT PORTFOLIO

Founder & AI Product Strategist | Independent Product Portfolio

2024 – Present

Portfolio Strategy: Built a cross-industry AI product portfolio spanning healthcare, regulatory intelligence, and career technology, translating ambiguous business problems into product strategies, human-in-the-loop architectures, governance controls, and executable roadmaps.

- **AI Clinical Review Copilot (In Production):** Designed and prototyped a reviewer workflow that maps medical records and procedure requests to CMS coverage criteria, identifies evidence gaps, and generates explainable, audit-ready outputs for human decision-makers.
- **Regulatory Intelligence Platform (MVP):** Built an automated sanctions-monitoring platform using Apify, n8n, Supabase, and LLMs to ingest, deduplicate, classify, summarize, and alert on regulatory changes across U.S., U.K., U.N., E.U., and Canadian authorities.
- **AI Career Platform (In Production):** Developed a React and TypeScript application featuring resume optimization, interview coaching, avatar-based simulations, and automated preparation workflows powered by Supabase, Claude/OpenAI, and HeyGen.

CSAT Solutions

Senior IT PMO Business Partner – Apple & Dell Technologies

Houston, TX | 2018 – 2019

- Served as the senior PMO business partner for Apple and Dell technology programs, translating client priorities into governed roadmaps, delivery metrics, risk visibility, and executive decision support.
- Designed and implemented a secure data-deletion solution for decommissioned government laptops, automating NIST 800-88 and DoD 5220.22-M compliance, reducing human error by 90%, and accelerating cycle time by 35%.
- Directed predictive analytics and workflow-automation initiatives that reduced repair errors by 20%, manual intervention by 25%, and processing time by 18%.
- Led legacy-operations modernization through automation and cloud-based solutions, improving operational efficiency by 40% and generating \$5M in annual savings.

NRG Energy

Project Manager & Implementation Consultant – Retail Operations

Houston, TX | 2016 – 2018

- Led cross-functional delivery of retail-energy platforms across business, technology, compliance, and vendor teams, establishing delivery governance and resolving dependencies from design through launch.
- Designed and implemented SAP billing enhancements that reduced annual operating costs by \$500K and

improved customer satisfaction by 30%.

- Delivered a PCI-compliant IVR payment solution and redesigned supporting workflows, expanding secure customer self-service while reducing average call-handling time by 20% and improving first-call resolution.

CenterPoint Energy

Project Manager & Business Analyst – Telecommunications

Houston, TX | 2015 – 2016

- Led the \$29.4M Fiber Expansion Program, improving communications throughput by 40% and reducing reliance on legacy microwave infrastructure.
- Directed the \$3.7M Cell Relay Growth initiative and governed \$8M in capital-project budgets, coordinating engineering, operations, vendors, and field teams while reducing cost variance by 15%.
- Implemented automated device-synchronization and performance-monitoring protocols, improving network uptime and reducing downtime-related losses by 30%.

United States Army

Intelligence Analyst

San Antonio, TX | 2011 – 2015

- Produced predictive intelligence assessments that synthesized adversarial capabilities, operational indicators, and emerging risks to support senior-leader decisions.
- Prepared and delivered confidential, secret, and top-secret intelligence briefings, translating complex findings into clear implications and recommended actions.
- Supervised and developed junior analysts while designing resource-tracking and reporting systems that strengthened analytical quality, accountability, information visibility, and mission readiness

EDUCATION

Master of Science – Management Information Systems

Texas Southern University, Houston, TX | May 2018

Master of Business Administration – Business Administration and Management

West Texas A&M University, Canyon, TX | 2016

Bachelor of Science – Business and Accounting

University of Phoenix, Phoenix, AZ | 2014

CERTIFICATIONS

- **Project Management Professional (PMP) | 2016**
- **AWS Certified Cloud Practitioner | 2023**
- **Professional Scrum Master (PSM I) | 2017**
- **Certified FinOps Practitioner | 2023**