

KELLY CONKLIN

Product Leader | AI Strategy, Design & Enterprise FinTech Platforms

Durham, NC | 704.964.9788 | [Email](#) | [LinkedIn](#) | [Portfolio](#)

SUMMARY

Product leader with 20 years of experience building and scaling product organizations behind platforms trusted by 44M+ users. I translate AI and data strategy into differentiated, commercially successful product capabilities — running discovery, roadmap, and go-to-market for complex, regulated financial platforms. I've unified acquired products into single platforms, driven double- and triple-digit growth through market-driven prioritization, and built governance-by-design practices for compliance-critical systems. I'm energized by matrixed, high-growth environments where I operate as a peer across product, engineering, and executive leadership.

SKILLS & EXPERTISE

AI Product Strategy & Roadmap Development | Product Discovery & Market-Driven Prioritization | Hiring, Mentoring & Team Development | Commercialization & Go-to-Market Strategy | Governance, Risk & Compliance (WCAG, Model Risk) AI-Driven Product Strategy | Executive & Cross-Functional Stakeholder Management | M&A / Acquisition Integration | Voice-of-Customer Research & Win/Loss Analysis

TOOLS

Claude | Analytics Tooling (Pendo/Heap) | Jira & Confluence | Figma | PowerBi | Github

EXPERIENCE

Investnet | Raleigh, NC

Principal Director, Product Design | 2022 – Present

Director, Product Design | 2019 – 2022

Investnet's B2B & B2C ecosystem supports 1/3 of all US advisors, 20M+ investor accounts, \$6.5T in platform assets, 800 asset manager partners and 19K data sources.

- Lead a **20+ person product organization** co-owning AI and product strategy with product managers, directors, and executive leadership across 50+ scrum teams — spanning reporting, trading, financial planning, data aggregation, AI, and client portal products — driving product quality, client satisfaction, and operational efficiency.
- Owned discovery and roadmap for **AI-driven product capabilities** across retail banking insights, budgeting categorization, and wealth data solutions — validating market problems and translating them into requirements that positioned the platform at the forefront of AI-enabled financial tooling.
- Drove **300%+ account growth in two years** by leading product strategy for the highest-margin product lines — validating market problems through client research, redesigning key workflows, and directing targeted enhancements that lifted adoption and revenue performance.
- **Built a repeatable product operations practice**, standardizing product requirements, cross-team handoff, and governance/compliance review processes — reducing technical debt and enabling consistent delivery across 50+ scrum teams.

- Led a company-wide **governance and compliance initiative**, partnering with specialized vendors to define requirements and remediate the platform — achieving WCAG 2.1 AA regulatory compliance across all client-facing products.
- Unified product experience across 5 acquired companies through cross-functional coordination and research-driven prioritization — driving **100% adoption** of the unified wealth platform across all firms
- Founded a client advisory board (Super User Group) **engaging 15+ top clients** through structured, in-person and virtual voice-of-customer research — an outside-in approach to prioritization that directly shaped roadmap priorities and product requirements.
- Hired, mentored, and promoted product talent through a period of rapid growth — **scaled the team from 2 to 20, promoted 5, and maintained a 90% retention rate.**

ACN | Concord, NC

Creative Director | 2014 – 2019

Senior Designer | 2010 - 2014

Designer | 2006 - 2010

- **Built and led a multidisciplinary team** — designers, videographers, and photographers — **overseeing B2B and B2C production across 26 countries** for major partners including AT&T, Vivint, DISH, and DIRECTV.
- **Translated brand strategy into scalable systems**, directing marketing campaigns and websites that powered business-building initiatives across international markets.
- **Owned end-to-end program delivery — graphics, video, and photography — for 4 flagship international events annually**, each drawing up to 25,000 attendees, leading cross-functional teams through high-stakes, zero-slip deadlines.

Studio Seven Designworks | Charleston, SC

Designer | 2004 - 2006

EDUCATION

Bachelor of Arts, Graphic Design

Flagler College, St. Augustine, FL

AWARDS

2024 Advisor Choice Award – Best Technology Provider for Innovation Platforms

2024 Best Unified (All-in-One) System – Wealth Management Platform