Ivan Wong

Senior Engagement and Delivery Lead | Enterprise Delivery, Forward-Deployed Teams and AI

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PROFESSIONAL SUMMARY

- Engagement and delivery lead with 10+ years in enterprise consulting at Capco, IBM Consulting, EY and Electric Mind, owning complex software initiatives from scoping through execution and launch
- Primary point of contact for C-suite and senior client stakeholders, including a CTO through a divestiture affecting 170+ credit unions and executives at three companies on a joint launch
- Embeds with client teams to set the plan, the weekly cadence and the decision log, surfacing risks early and keeping multi-workstream programs moving
- Ran a 12-week AI automation program that assessed 78 banking processes, and uses Claude, Cursor and ChatGPT to prototype apps and build personal AI agents

CORE COMPETENCIES

Delivery leadership: End-to-end delivery ownership, scoping, roadmaps and phasing, dependencies, multi-workstream programs, operating cadence, status reporting, risk and issue management, scope management, documentation

Client and stakeholders: Enterprise client management, C-suite and executive stakeholders, forward-deployed and embedded delivery, discovery workshops, translating between engineering and business teams

AI enablement: AI adoption, AI process automation, AI-enabled workflows, use-case assessment, AI-assisted prototyping with LLM tools (Claude, Cursor, ChatGPT), personal AI agents

Methods and tools: Agile, Scrum, Kanban, SAFe (POPM); Jira, Confluence, Figma, Miro; SQL

Industries and languages: Banking, payments, credit unions, fleet finance, marketing technology; English, Cantonese

PROFESSIONAL EXPERIENCE

Electric Mind | Senior Engagement Lead (Contract)

Nov 2024 – Present

Enterprise client engagements in banking, payments and fleet finance

Global fleet management company, digital fleet payments | *Go-to-Market Lead*

- Served as primary client point of contact and set up launch governance for a three-company launch, aligning executives at the client and its bank and technology partners on pricing, payment flows and operational readiness
- Kept a shared decision log with owners and trade-offs, so decisions kept moving without formal authority
- Drove launch readiness, go-to-market and sales enablement for a fleet payments product targeting ~45,000 units

Big Five Canadian bank, AI strategy and operations | *Product and Engagement Lead*

- Ran a 12-week AI automation engagement as primary client point of contact across 10+ everyday banking lines of business, with 30+ workshops and 78 processes assessed for automation
- Escalated dependency risks early and re-baselined the plan, then delivered 2 automation proofs of concept
- Defined the enterprise Generative Engine Optimization (GEO) strategy and shipped optimization proofs of concept

Canadian credit union central, digital banking divestiture | *Strategic Delivery Lead*

- Led delivery across due diligence, invoicing migration and operational handoff workstreams for 100+ enterprise clients during the sale of the client's digital banking business
- Advised the CTO and coordinated product, finance and legal teams to keep service running through a transition affecting 170+ credit unions

Canadian digital bank, acquisition program | *Project Manager, then Senior Product Manager* 2026

- Helped scope and then managed the payments architecture discovery, producing a payments migration strategy and target-state architecture
- As Senior Product Manager for EFT, internal transfers, FX and shared payment services, developed target-state requirements and the target-state customer experience for the migration

.Monks | Senior Product Manager — Jun 2022 – Oct 2024

Monks.Flow | *Product Lead*

- Delivered Monks.Flow, an AI-powered marketing optimization and forecasting platform, from concept to MVP in 2 months, leading product, engineering, design and data science
- Scoped the MVP to forecasting first so it could be validated with CMOs faster, and resolved design and engineering trade-offs to launch on time
- Owned the roadmap and MVP delivery, with projected client ROI gains up to 30%

IBM Consulting (IBM iX) | Managing Consultant — Jul 2021 – Jun 2022

Top 10 US bank, transaction limits and entitlements | *Senior Product Manager*

- Led a team of 10 developers building a centralized platform for transaction limits and feature entitlements across 5 retail banking lines of business
- Managed the release of 6 end-to-end use cases connecting wire transfers, debit cards and other products to a platform that supports 700 transactions per second and enforces limits on 25M debit cards
- Secured buy-in from senior stakeholders across divisions, with regulatory compliance and security built in

Capco | Senior Consultant — Aug 2016 – Jul 2021

Promoted from Associate (2016) to Consultant (2018) and Senior Consultant (2020)

Canadian credit union central, cross-border payments | *Product Manager*

- Directed a $1M project with 4 developers and 1 QA analyst, delivering 2 product integrations in parallel for a platform serving 40+ Canadian credit unions
- Facilitated a launch-planning workshop with legal, infosec, marketing and vendor teams to build one master timeline, then ran weekly reviews of critical items
- Launched with 3 pilot credit unions, giving 70,000+ active members low- or no-cost international transfers
- Monitored post-launch performance and traced low activity to a login-blocking security token mismatch whose fix improved adoption

Additional engagements

- Unblocked a late-stage launch when a vendor integration defect overwrote user data, convening a solution architect and scoping the smallest fix so the launch held with minimal budget and schedule impact
- **Process re-engineering, global financial services provider:** re-engineered workflows for 30,000+ users across 3 lines of business, cutting end-to-end execution time by 80% and improving efficiency by 50%+
- **Digital strategy, Canadian Tier 1 bank:** led roadmap planning for an $80M digital banking platform strategy affecting 8M customers over 5 years
- Elicited requirements for 20+ features on a $10M+ digital platform build at a Tier 2 Canadian bank, working in an Agile delivery model
- Defined target-state requirements for a Big Five bank's business banking and built a payments fundamentals course for executives

EY | Staff Consultant, IT Risk Assurance — Sep 2014 – Apr 2015

EDUCATION AND CERTIFICATIONS

University of Waterloo | Honours Bachelor of Accounting and Financial Management — 2015

Certifications: SAFe Product Owner/Product Manager (POPM), IBM Design Thinking Practitioner

AI PROJECTS AND COMMUNITY

- **AI agents and apps:** built IvanOS, a personal operating system with an AI chief of staff; building FUNNR, an AI artist-manager agent, and golf apps with Claude and Cursor
- **Community:** Co-Founder of YOUnity, leading 30 volunteers to raise $3M+ across 2 galas; DJ and producer (iFunner)