KATHERINE MORRIS, MBA, PMP

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PROFESSIONAL SUMMARY

- **Data-driven healthtech product manager** transforming complex processes into innovative solutions, improving customer outcomes and business performance with a bias towards action.
- **7+ years of cross-functional experience** spanning project management, security, marketing, customer service, and IT/business operations within healthcare organizations ranging from 20 to 900+ employees, contributing to revenue growth of up to 9 figures.
- **2+ years of product management expertise** overseeing B2B HIPAA-compliant proprietary SaaS platform with 3,000+ active users, keeping platform secure, fast, and reliable.

AREAS OF EXPERTISE

- Change management
- Strategic product planning
- Stakeholder & team communication
- IT & data security
- Data analysis & research
- Agile software development
- User experience design
- Customer feedback management
- Project management
- Software development

PROFESSIONAL EXPERIENCE

CarePoint Blue Sky Neurosciences   Greenwood Village, CO / Remote
IT Program & Product Manager   *October 2022-Present*
Internally promoted within the Telehealth division, a physician-owned multispecialty practice delivering tele-neurology services to 300+ facilities across 25 states, with 175,000+ annual patient encounters and 3x YoY revenue growth. Work closely with cross-functional teams, clients, and 3rd party vendors.

Software Product Management
- Product Manager for a B2B cloud hosted web platform that functions for clinical documentation, paging, interfaces for data sharing, and admin reporting features. Develop and maintain a quarterly roadmap to ensure alignment with organizational goals and strategic priorities.
- In an Agile environment, manage user stories, backlog, quality assurance testing, and stakeholder management to ensure alignment and successful outcomes.
- Conducted the company's first physician surveys and interviews, synthesizing user feedback with business objectives to prioritize and drive new feature development and platform improvements.
- Software uptime kept at 99.97%, ensuring reliability and speed in paging for stroke and neurology consults.
- Designed and implemented a bidirectional HL7 interface in 2024, enabling seamless telehealth billing with vendors. Developed documentation and real-time monitoring data analytics dashboard with error alerting capabilities to ensure system reliability and operational efficiency.

Program Management of IT
- Lead multiple large in scale IT projects at a time with interdepartmental teams to align with business and client needs, monitoring projects from initiation through delivery using KPIs.
- Manage six-figure IT and software development budgets, scopes, and timelines; maintaining software costs 8% below budget in 2024.
- Collaborate with clients and vendors to improve clinical integrations with health systems, including EHR, PACS, HL7, and SSO.
- Liaison with vendors, including vendor procurement and build vs buy analyses.
- Conduct HIPAA risk and vendor security assessments and audits, enhancing compliance and cybersecurity.
- Create and update operational and security procedure and protocol documentations for internal and external clients.

Project Coordinator, Implementations and Onboarding   *January 2021-October 2022*
- Led implementation of telehealth services at 40 new facilities in 10 months, supporting division growth from 200 to 250+ facilities in a year.

- Onboarded 30+ neurologists, optimizing EHR, PACS, camera, and paging system setups, achieving a 97% retention rate in the first year.
- Developed video education and process documentation for clinician onboarding across 250+ facilities.
- Fostered client relationships through regular meetings to coordinate onboarding and support.
- Delivered white-glove technical support and training for SaaS web portal users.

Hearing HealthCare Centers   Boulder, CO
Patient Nurture Coordinator   *July 2020-December 2020*
Part time role in small-business audiology center with 7 locations with an annual revenue of 7 figures.

- Used EHR data to analyze and document patient communication through both EHR and email automation marketing system. Performed marketing and sales analyst tasks to measure and configure marketing performance indicators for improved workflow.
- Executed deployment of patient portal and online scheduling; implemented EHR communication procedures for staff using change management methods for effective and personal patient touches for optimizing sales funnel.
- Collaborated with marketing team to implement complex processes of marketing efforts. Continued to expand, revise, and modify marketing system with input from providers and staff.

Marketing & Outreach Manager   *October 2018-July 2020*
Internally promoted at a small-business audiology center with 7 locations with an annual revenue of 7 figures.

- Executed deployment of company's first patient portal and online scheduling system in 2020.
- Designed & launched first marketing product system for the company for 13,500+ patient database using Active Campaign software in <4 months. Implemented new upgrades and rollouts to marketing system on ongoing schedule.
- Collaborated with marketing team to implement complex processes of marketing efforts. Continued to expand, revise, and modify marketing product with feedback from staff.
- Increased sales from patient referrals by 68% and physician referrals by 80% from 2018-2019.
- Executed 33 educational events to Colorado communities in 2019.

Audiology Assistant   *June 2017-October 2018*

- Delivered professional patient care to up to 20 patients daily by performing ear exams and hearing screenings, documenting full hearing histories, and servicing hearing aids.
- Cross trained as Patient Care Coordinator to assist in answering patient calls, scheduling appointments, and other customer service requirements.

EDUCATION & CERTIFICATION

MBA in Health Administration, focus in Health IT
University of Colorado, Denver, CO

Project Management Professional certification
Project Management Institute

Bachelor of Science, Neuroscience
Regis University, Denver, CO

Artificial Intelligence Micro-Certification (AIC)
Product School

TECHNICAL SKILLS

Jira, Confluence, AWS, Figma, Asana, Monday, Trello, Zapier, Slack, Zoom, Canva, Power BI, Google Workspace, MS Office Suite, Agile and waterfall methodologies