

RICHARD WHERRY

AI Applications Product Leader · Agentic Workflow Design · LLM-Enabled Internal Tooling
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PROFESSIONAL SUMMARY

I build AI systems that make internal teams faster, and I spent 21 years learning where the friction lives. At Macy's and Paycor I owned the BI product lifecycle across marketing, merchandising, credit, and CX operations, running Product Owner backlog governance for the analytics function, leading teams of up to 12 analysts, and rewiring reporting for four business units. Today I design and ship agentic solutions through Lumen Solutions LLC: building in Claude Code, integrating MCP servers into working production systems, and deploying a Claude-powered assistant now in daily active use at a nonprofit client.

CORE COMPETENCIES

Product & Delivery

- AI Product Roadmap Ownership
- Product Owner Backlog Governance
- Agile / Scrum · Waterfall Delivery
- Rapid Deploy-and-Iterate Cycles
- Analyst Team Leadership (up to 12)
- Offshore & Vendor Management
- Change Leadership

AI & Emerging Tech

- Agentic Workflow Design
- Claude Code / LLM Dev Environments
- MCP Server Integration
- Prompt Engineering
- LLM Integration (Claude, Copilot)
- AI Adoption & Change Management
- Internal Tooling & Automation

Revenue-Side Domain

- Merchandising & Pricing Analytics
- Promotions & Campaign Reporting
- E-Commerce Sales Intelligence
- KPI Reporting & Dashboarding
- Power BI Architecture & Governance
- Snowflake · SQL Server · SQL/DAX
- Self-Service Analytics Enablement

PROFESSIONAL EXPERIENCE

LUMEN SOLUTIONS LLC

Jun 2026 – Present

Founder & Principal AI Consultant

- Design and ship agentic AI applications from discovery through production deployment. Built a custom Claude-powered assistant for a nonprofit client, enabling communications and donor relations leadership to accelerate major donor campaign development and employee handbook modernization, reaching daily active use within weeks of launch.
- Build in Claude Code against a Model Context Protocol (MCP) server architecture, orchestrating multi-tool agentic workflows across email, calendar, browser automation, and file systems. Deploy on a rapid iterate-in-production cadence.

PAYCOR

Apr 2022 – Jun 2026

Senior Manager, Client Experience Reporting & Analytics

Jun 2024 – Jun 2026

- Expanded scope from CX analytics to enterprise-wide: led reporting and analytics for all of Paycor, then served as analytics continuity lead through the Paychex acquisition (Apr 2025), maintaining full dashboard and KPI cadences without interruption and onboarding Paychex stakeholders to Paycor reporting infrastructure.
- Drove AI adoption across the analyst team: onboarded 10-person team onto Claude, Microsoft Copilot, ChatGPT/LibreChat, and Paychex internal AI tools, establishing AI-assisted workflows for documentation, data governance, and report automation.
- Architected and maintained a five-workspace Power BI ecosystem (Service/CX, Success, Implementation, Leadership, Development) spanning 200+ active dashboard views connecting Gainsight, Salesforce, and Snowflake, including four executive dashboards and a custom implementation journey tracker with velocity-based forecasting.
- Delivered on-demand analytical studies (A/B testing, retention analysis, case aging) through bespoke Snowflake connections, providing point-in-time intelligence the standard reporting pipelines could not reach.

Manager, CX Reporting & Analytics

Apr 2022 – Jun 2024

- Served as centralized analytics and KPI reporting lead for four CX business units (Implementation, Customer Service, Client Success, Contact Center Support Operations); led a team of up to 10 domestic and offshore analysts and established the reporting infrastructure from the ground up.
- Built the company's first multi-channel first-contact resolution methodology, creating FCR visibility across voice, chat, and digital channels. Within six months, sustained FCR improved from 75% to 90%+, holding through 2024.

- Partnered with Engineering, Data Science, and Operations SMEs to design and measure a custom retention analytics initiative contributing directly to a 15% reduction in client loss revenue within the fiscal year, including ROI measurement and executive reporting supporting budget and performance decisions.
- Introduced Agile intake and sprint governance as Product Owner for the analytics backlog, establishing readiness reviews, definitions of done, and per-sprint effort estimates. Freed 15% of team capacity for real-time triage and executive analysis.

MACY'S, INC.

Jun 2005 – Apr 2022

Senior Manager, Business Intelligence (Senior Project Manager)

2018 – 2022

- Owned the BI product lifecycle for Macy's Retail customer service operations (website, big-ticket, credit, and fulfillment), delivering KPI dashboards, scorecards, and financial reports via Tableau Server and Power BI in a Waterfall delivery model.
- Built and led a 12-person analyst team (domestic + offshore in Philippines and India), managing a prioritized backlog of large-scale dashboard builds and financial reports, partnering with Engineering and Operations from scoping through delivery.
- Maintained reporting continuity through the 2020 COVID furlough with a sharply reduced team; built and administered a Tableau Server environment on SQL Server data mart, owning content governance and data integrity across a multi-LOB reporting ecosystem.

Senior Manager, Partner Center Operations & Support

2017 – 2018

- Managed offshore contact center vendor performance for Macy's Credit across Philippines-based partner sites; owned SLA accountability, contractual compliance, headcount management, and executive vendor relationships across operations teams of up to 50.
- Produced workforce analytics and financial reporting to support ROI measurement and vendor contract management decisions.

Senior Manager, Omnichannel Analytics & Reporting

2010 – 2017

- Built and scaled Macy's omnichannel analytics function from a single e-commerce focus to a multi-LOB reporting capability covering website, big-ticket/furniture sales, and credit support operations, growing the team across seven years of expanding scope.
- Delivered service performance, customer experience, and automation analytics, establishing the cross-channel KPI framework later adopted across the broader retail customer service organization.

Digital Big Ticket Manager

2008 – 2010

- Built Macy's first intraday sales reporting capability for online Big Ticket using mainframe-based automation, creating real-time sales visibility that had not previously existed, including through Macy's first million-dollar online sales days.

Digital Customer Service Associate → Trainer → Contact Center Lead

2005 – 2008

TECHNOLOGY & TOOLS

Claude Code · MCP Servers · Agentic Workflow Design · Prompt Engineering · Claude · ChatGPT · Microsoft Copilot · Power BI Desktop (8+ yrs) · Tableau Desktop & Server (11+ yrs) · Snowflake · SQL Server · SQL/DAX · Salesforce · Gainsight · Reporting Automation

EDUCATION

Bachelor of Arts in Economics · Colorado State University, Fort Collins, CO