

# Joseph W. Wheeler

Greensboro, NC 27455 | <https://www.linkedin.com/in/jwheelerTWS/> | 301-395-2016 | [joseph.wade.wheeler@gmail.com](mailto:joseph.wade.wheeler@gmail.com)

## Lead Product Manager, Data and AI

---

Enterprise product leader with 20+ years of experience building digital platforms, analytics capabilities, and operating models that improve execution across complex organizations. Leads AI- and analytics-enabled product strategy and delivery practices that accelerate operations, including reducing investigative analytics from months to hours while expanding capacity without additional staff overhead. Proven ability to align cross-functional stakeholders, translate strategy into execution, and drive measurable financial impact, including \$15 million in contested clawbacks and recovered value.

## Professional Experience

---

### ATI Government Solutions (2025–Present)

*Data Analytics Product Lead*

- Translated complex IRS call center requirements into scalable product workflows, supporting modernization for 30,000+ CSRs across taxpayer service operations.
- Defined taxpayer personas and CX journey maps to align product strategy, customer needs, and change management across services supporting 165 million taxpayers.
- Led rollout of the Nerve Center executive dashboard across 5 cross-functional teams, improving visibility into platform performance and taxpayer experience.
- Established HCD and metrics standards while mentoring junior analysts, increasing team productivity by 40% and stakeholder engagement by 75%.

### Strategic Product and Data Consulting (2024–Present)

*Consultant, Data and Product Strategy*

- Re-architected service-to-payment workflows to accelerate reimbursement dispute resolution by 80% through faster analysis of delivery patterns.
- Automated complex audit workflow rules, helping contest and recover over \$5M in penalties and disputed reimbursements.
- Delivered LLM-powered applications from concept through production, reducing product delivery cycles by 80% through reusable AI workflows, governance, and evaluation practices.
- Created a \$3M data analytics product line by turning customer data into monetization strategy, acquisition models, and repeatable product offerings.
- Directed change management strategy for institutional clients, supporting adoption by 300 platform users serving hundreds of thousands of behavioral health clients.

### FINRA (Financial Industry Regulatory Authority) (2022–2024)

*Lead Product Manager, Enforcement Data Insights*

- Architected AWS and SQL analytics capabilities for Enforcement risk forecasting, reducing investigative analytics turnaround from months to hours and enabling larger investigations without added staff.

- Co-led product launch of Kinections, an AI-enabled triage capability that filtered true negatives and reduced manual review of complaints and representative terminations by 80%.
- Coordinated 3 cross-functional teams to modernize Enforcement analytics and data infrastructure, improving reporting, dashboards, and investigation workflows to identify \$35M+ in missed compensation.
- Designed executive Risk Scorecards that surfaced performance trends and workflow bottlenecks across leadership, attorney, and analyst teams.

### **Qualifacts Behavioral Health (2015–2022)**

*Product Management Lead, Business Intelligence*

- Defined enterprise analytics strategy across EHR platforms, strengthening data standards and digital health delivery for 300+ behavioral health agencies.
- Built and mentored companywide product team from 3 analysts to 8 product leaders, strengthening data-driven product management across EHR platforms.
- Spearheaded revenue cycle dashboard enhancements that identified calculation gaps, recovering approximately \$10M annually across pilot agencies.
- Led delivery of clinical readmission Risk Scorecards and dashboards that helped contest \$5M in state claw-backs through improved compliance validation.
- Built stakeholder alignment across Product, IT, and Engineering to deliver regulatory modules early, supporting client compliance, accreditation, and competitive sales wins.
- Led SQL, data analysis, and reporting training for 20 internal and 300 external users, expanding data-driven decision-making across product and client teams.

### **MagView Medical Systems (earlier career)**

*Product Manager*

- Directed end-to-end EHR implementation across a statewide network of 19 hospitals, including HL7 interface builds and custom SQL reporting.
- Coordinated compliance updates for VA CHIP, Meaningful Use, Risk Registry, risk modeling, and health surveillance mandates, enabling early client adoption.
- Managed billing and scheduling reporting capabilities for 200+ radiology clinics, improving operational visibility across clinical workflows, clean billing rates to 98%, and reducing staffing overage by 15%.

---

### **SKILLS**

- **Product Leadership:** Product Strategy, Product Operations, Product Roadmapping, Product Operating Models, Cross-Functional Leadership, Stakeholder Management, Change Management, Team Building, Agile Delivery, Scrum, SAFe, Jira
- **Data & Analytics Strategy:** Data Product Management, Analytics Strategy, KPI Definition, Data Governance, Master Data Management, ETL/ELT, SQL, Executive Dashboards, Power BI
- **AI, Automation & Governance:** Generative AI Strategy, LLM-Powered Workflow Design, Prompt Engineering, AI Governance, Evaluation Frameworks, Guardrails, Automation Strategy
- **Compliance & Risk:** HIPAA, Healthcare EHR/EMR, Revenue Cycle Management, Financial Enforcement, Auditability, Regulatory Compliance, Risk Modeling, Risk Mitigation