Charles Klein

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Profile

20 years of experience spanning design leadership & strategy, Product design, prototyping, user testing & research, and product management/ownership. A champion of human-centered design, have led several initiatives from 0 to 1 and beyond. 10 years of people leadership experience with up to 5 direct reports.

Experience

SENIOR DESIGN MANAGER, CAPITAL ONE; NYC (HYBRID) – SEPTEMBER 2022 - PRESENT
DESIGN MANAGER – SEPTEMBER 2022 - JANUARY 2024

- Promoted to Senior Manager from Manager in January 2024 with above strong ratings in both mid-year and end-of-year performance review cycles.

- Design Program Lead in Data Infrastructure with direct impact to Commercial Bank OKRs: driving results in data standardization & governance to unlock future experiences for our customers, and streamline associate tools to increase revenue.

- Defined the design strategy for data infrastructure in Commercial by facilitating workshops and conducting user research to develop future state horizons that directly influenced and altered product roadmaps and strategy.

- Connected the dots across lines of business (LOBs) to facilitate workshops and contribute design solutions to Enterprise platforms that directly impact Enterprise-level initiatives and drive the priorities of the Commercial Bank.

- Created a design strategy for Commercial Real Estate lending that influenced bank-wide modernization efforts and strategies for a lending platform.

SENIOR DIRECTOR, PRODUCT DESIGN & HEAD OF BRAND, TACT.AI TECHNOLOGIES; REMOTE – JULY 2014 - JULY 2022
DIRECTOR, PRODUCT DESIGN – MARCH 2019 - JULY 2021
HEAD OF DESIGN – MARCH 2018 - MARCH 2019
PRINCIPAL PRODUCT DESIGNER – JULY 2014 - MARCH 2018

Tact was a human-centered customer engagement platform integrating AI to an enterprise's existing CRM, BI systems, and data lakes to drive revenue through sales enablement.

- Conceived the "Salesflow" extensible workflow experience – configurable server or in-app triggers that guide users via push notifications and in-app experiences in order to capture relevant information in real-time – leading to an increase in follow-up tasks and contacts created in CRM.

- Spearheaded "Conversational Forms" strategy, a human-centered extensible framework for conversational AI data entry adding to a 200+% increase in activity logging to CRM.

- Championed user experience for our voice or text only conversational AI integrations across multiple device and software categories (Amazon Alexa, Google Assistant, Siri, Slack, Microsoft Teams).

- Defined the design system for our flagship application across iOS, Android & Windows, creating design consistency while enabling white-label solutions for Enterprise customers.

- In absence of Product function acted as the Product Owner on several initiatives producing requirements, and conducting scrum of scrums during build phase.

- Collaborated directly with the Founder & C-Suite to build strategy decks, demoes, and concepts impacting 3 successful funding rounds (Series C-E).

- Scaled the design team across user experience & marketing spanning our offices in California and Bangalore, India.

- Promoted 4 times over 8 years, starting as a Principal Product Designer.

DESIGN DIRECTOR, YESVIDEO; SANTA CLARA, CA – JULY 2013 - JULY 2014

YesVideo was a leading memory digitization company in the US, safely and securely transferring analog media to digital for online access & sharing.

- Led the effort to create a first-party branded product and experience generating wireframes, conducting research, documenting user flows, prototyping for a redesigned web application and 0-to-1 iPhone and iPad experiences.

- Designed product features for a partnership with Hallmark to bring their artwork, music, and expressions to our platform for creating shareable clips with our user's family memories.

- 3 direct reports: 2 UX designers + 1 front-end developer

LEAD UX DESIGNER, WALMART INC/WALMARTLABS (KOSMIX); SAN BRUNO, CA – OCTOBER 2011 - JULY 2013

The Goodies Co was an independent start-up-like team carried over from the acquisition of Kosmix. Goodies was a subscription snack discovery box.

- Designed the 0-to-1 experience for a digital storefront by generating wireframes, conducting research & focus groups, and documenting user flows for three distinct user types: leads, members, and subscribers.

- Led the design from 0-to-1 of our Order Management System (OMS) for buyers to track and stock product on our site.

- Created personas, logos, brand guidelines, and the UX design system. Provided creative direction for the physical box, inserts, and photographers.

DESIGN CONSULTANT & STRATEGIST, CHARLES KLEIN; REMOTE – MARCH 2010 - SEPTEMBER 2020

Providing UX & Product design solutions for a range of clients in eCommerce, Venture Capital, Startups, Non-Profit & Education. Client list on my website.

CO-CREATOR/CO-FOUNDER, MEMORABLE APPS; SAN FRANCISCO, CA – SEPTEMBER 2010 - FEBRUARY 2016

Developed 3 apps for iPhone, in Objective-C, for journaling and organizing your favorite wines, meals, and beers. At the peak we had hundreds of thousands of users across the globe.

PRINCIPAL WEB DESIGNER, PETERS KIMMERLY DESIGN ASSOCIATES; SAN FRANCISCO, CA – JANUARY 2009 - JANUARY 2011

Researched, designed, and implemented web experiences for agency clients to complement print designs and branding.

LEAD DESIGNER & UNIVERSITY WEB MANAGER, HUMBOLDT STATE UNIVERSITY; ARCATA, CA – OCTOBER 2003 - MARCH 2010
WEB DESIGNER – JAN 2004 - JUNE 2007
STUDENT ASSISTANT WEB DESIGNER – OCT 2003 - JAN 2004

Worked with the award winning in-house agency at HSU and oversaw the redesign of dozens of sites for campus departments and high-level marketing initiatives.

- Started as a part-time student assistant in 2003 to join full-time as a web designer in 2004. Promoted to University Web Manager in 2007.

Education

Humboldt State University – B.A. Graphic Design

Skills

- Design Strategy & Leadership
- Product Design (UX, UI, visual)
- User Research, User Testing
- Interactive Prototyping, LowFi & HiFi
- Experience in Agile & Design Thinking; partnering across Tech & Product
- Finance, Commercial Banking, Enterprise SaaS (B2B, B2B2C), eCommerce
- Tools: Figma, Sketch, Adobe CS, Apple Keynote, AfterEffects, Final Cut Pro, Principal, Zeplin, Pixate, InVision, Jira, Asana, Trello, Pivotal, XCode, Git