

DAVID LI

Product Manager | Insurance Platforms, Partner APIs, AI Workflows, Analytics & Digital Product Delivery

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PROFESSIONAL SUMMARY

Product Manager / Technical Product Manager with 7+ years building regulated digital platforms across insurance, financial-services workflows, partner distribution, API/data requirements, customer-facing purchase flows, analytics instrumentation, and enterprise modernization. Known for turning ambiguous customer, partner, operations, compliance, and engineering needs into clear product strategy, PRDs, roadmaps, launch plans, and measurable outcomes.

PRODUCT STRENGTHS

Product Strategy	Owns discovery, roadmap tradeoffs, PRDs, epics, user stories, acceptance criteria, launch readiness, KPI frameworks, and post-launch iteration.
Insurance Platforms	Builds regulated insurance experiences across partner, white-label, D2C, API, CRM, customer-service, compliance, payment, analytics, and operations channels.
API & Data Products	Defines API/data-flow requirements, data mappings, expected system behavior, edge cases, data quality rules, dashboard needs, UAT, and release support.
AI Workflows	Shapes AI-assisted workflow concepts with clear use cases, success metrics, human oversight, auditability, fallback paths, and practical production constraints.
Growth & CX	Uses VoC, A/B tests, usage metrics, GA4, Adobe CJA, data layers, VWO, and funnel analysis to improve purchase, service, and operational workflows.
Operator Mindset	Combines product execution with P&L and operations leadership across 14 locations, 250+ employees, and \$20M annual sales ownership.

PROFESSIONAL EXPERIENCE

Traveler Insurance Services, A Zurich Company | Technical Product Manager | 2024/6 - Current

Regulated travel insurance platform across partner, white-label, D2C, API, CRM, data, and operations channels

- Transformed Costco Travel Insurance from a primarily weekday call-center-driven purchase model into 24/7 digital distribution; launched the white-label experience in six months, delivered \$23M+ first-year sales, reached \$50M+ in 2026 YTD sales, and is tracking toward a ~\$54M full-year forecast.
- Owned white-label execution for Costco SR and Retail insurance flows and supported Costco Travel booking-path API integrations before checkout across vacation, rental car, and cruise by providing API documentation, UI recommendations, data rules, analytics, UAT, and release support.
- Translated underwriting, customer-service, partner, operations, compliance, payment, CRM, analytics, data, and engineering needs into PRDs, epics, user stories, API/data-flow requirements, acceptance criteria, and implementation plans.
- Led Apple Pay integration on the U.S. D2C site, improving mobile checkout and increasing conversion by 3% while managing release readiness, UAT, privacy, quality gates, and post-launch validation.
- Coordinated GA4, Adobe CJA, data layer, consent mode, VWO testing, SQL/MS SQL and Power BI/Tableau-style dashboard requirements, and KPI frameworks to identify quote/purchase friction, data-quality issues, and integration priorities.
- Owned Adobe/AEM transformation roadmap migrating 14 white-label and D2C sites from Drupal to reusable front-end and analytics foundations, reducing duplication and targeting \$1M annual cost reduction.
- Shaped AI underwriting-assistant prototype concept using service data to infer customer intent, predict next actions, and support regulated service workflows with human oversight and auditability.

Mutual of Omaha | Product Manager | 2021/4 - 2024/5

Fortune 500 insurance company | Enterprise workflow platform in SAFe environment

- Used VoC interviews, A/B testing, usage metrics, custom Kanban workflows, and backlog scoring to prioritize features, improve visibility, and reduce refinement time by 25%.
- Improved platform efficiency by 10% by automating policy/claim-data injection into customer documents and cutting content assembly, letter generation, and dispatch time across 50+ teams.
- Optimized/redesigned content auto-assembly platforms for 3,000+ users and millions of policyholders, reducing operational costs by 5%.
- Partnered with business, operations, IT, compliance, and delivery stakeholders to clarify requirements, resolve dependencies, conduct UAT, present outcomes, and communicate release readiness.

REaCH | Product Manager | 2020/4 - 2021/4

Startup | 0-to-1 IoT data platform and field-operations dashboard

- Led 11-person team to build a 0-to-1 IoT dashboard backed by Django and Angular, securing \$1.5M funding and validating product needs across 22 fire stations.
- Aggregated near-real-time wearable sensor data and supported notification workflows for field visibility, safety decisions, and operational response across distributed teams.

Panda Restaurant Group | Area Manager | 2015/6 - 2019/12

\$20M multi-unit P&L ownership across 14 locations

- Owned operations and P&L for 14 stores and 250+ employees; launched UberEATS adoption, lifting sales 15% to \$20M annually and raising KPI ranking from #187 to #7 nationwide.

EDUCATION

- Georgia Institute of Technology - M.S. Computer Science, Machine Learning specialization, in progress
- University of Nebraska-Omaha - M.S. Management Information Systems
- Iowa State University - M.S. Hospitality Management | Keuka College / Tianjin University of Science & Technology - B.S. Business Administration

CERTIFICATIONS

Machine Learning Specialization, DeepLearning.AI / Stanford | Certified Product Manager, Product Manager Accelerator | Certified Scrum Product Owner, Scrum Alliance | Professional Scrum Master I, Scrum.org | AWS Cloud Practitioner, Amazon Web Services