

BRADLEE MORGAN

AI | Product Strategy | Business Architecture | Technical Product Management

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SUMMARY

Product and technology leader with 9+ years spanning AI product development, business architecture, pre-sales solutions architecture, and operations leadership. Designs AI automation and MCP server infrastructure, maps capabilities and value streams, and owns roadmaps from discovery through delivery. Has managed teams of up to 20 and guided delivery teams of up to 50 across enterprise consulting, SaaS, legal services, startups, and nonprofits. Turns ambiguous problems into buildable scope and measures success by adoption, cost, and revenue.

CORE COMPETENCIES

AI Infrastructure & MCP Server Development | Product Roadmap Ownership & Backlog Prioritization
Business Architecture & Process Analysis | Stakeholder Alignment & Executive Communication
Data Platform Strategy (Snowflake, Databricks, Power BI) | Agile & Lean Delivery (Jira, Azure DevOps, Monday.com)
API Integration & Systems Architecture | Change Management & Organizational Enablement
Discovery, User Research & Requirements Engineering | People Management & Cross-Functional Team Leadership

TECHNICAL SKILLS

AI/ML: Claude AI, MCP servers, RAG architecture, LLM prompt engineering, AI workflow automation

Data: Snowflake, Databricks, dbt, Python, SQL, ETL/ELT, Power BI, PostgreSQL

Product Management: Jira, Confluence, Azure DevOps, Monday.com, Asana, Linear, ProductBoard, Aha!, Notion, GitHub, Figma

Integration & Automation: Zapier, Make (Integromat), Pega, RESTful APIs, Webhooks, MCP servers

CRM & Sales: Salesforce, HubSpot, Clio, Practice Panther, Lawmatix, LawPay

Collaboration & Operations: Slack, Microsoft Teams, Google Workspace, Zoom, SharePoint, Box, Loom, Miro

Finance & Operations: QuickBooks, ServiceNow, Workday, NetSuite (familiar)

PROFESSIONAL EXPERIENCE

Fractional Technology Officer | Various Companies

Remote | Mar 2025 to Present

- Built custom integration systems for clients including SCGSR, Forsyth County Family Haven, and EData Co, cutting combined operating costs by approximately \$500K and shortening time to value.
- Built and deployed 12 MCP servers across 4 client organizations, connecting Claude to MyStates voter databases, business phone systems, meeting platforms, communication tools, and internal systems.
- Launched a subscription-based digital education platform from concept to live product, reaching 500 subscribers in 4 months.
- Co-developed a Power BI executive portal for Family Haven that consolidated 12 data sources into one reporting layer, now used for grant reporting and governance decisions.
- Set technology roadmaps for early-stage companies covering platform selection, hosting, and launch readiness, so founders could reach a working product without hiring a full-time engineering leader.

Product Manager and Operations Manager | Georgia Probate Lawyers (GAPL Moyer, LLC)

Cumming, GA | Jun 2024 to Feb 2025

- Ran full discovery with attorneys and clients after finding the firm's tools siloed and its data held together by manual workarounds that broke constantly, then turned the findings into the roadmap for GaProbate Connect, the client portal, shipping 15+ features in 6 months.
- Replaced broken handoffs with Zapier and Pega automation across the intake-to-cash process, cutting AR backlog 60% in six months and bringing \$3M+ in receivables under active management.
- Ran sprint planning across a 20-person team, including four offshore developers in Chennai, India, and introduced Lean/Agile practices that cut meeting time 30%.
- Audited systems and licensing to remove orphaned tools and redundant subscriptions, reducing operating costs 15%.

Business Architect | phData (Snowflake Elite Partner, \$133M Revenue)

Remote | Sep 2023 to Jun 2024

- Worked between engineering teams and client executives on multi-million-dollar Snowflake and Databricks implementations, keeping each engagement tied to the business outcomes the client paid for.
- Led discovery sessions that turned vague requirements into structured use cases and prioritized backlogs for delivery teams of up to 50.
- Delivered executive presentations that secured client buy-in for platform and product roadmaps.

ConnectALL (Value Stream Management Platform)

Remote | Aug 2017 to Sep 2023

Solutions Architect & Product Strategist

Oct 2021 to Sep 2023

- Drove a 30% increase in B2B adoption and a 20% reduction in time-to-value through 200+ enterprise product demonstrations and solution designs.
- Led feature prioritization through Value Mapping Calls, driving Lean adoption and maintaining 98% client satisfaction against a 10% YoY growth target.
- Achieved a 95% technical win rate across competitive evaluations.

Solutions Architect & Technical Sales Development Representative

Mar 2018 to Apr 2021

- Built the SDR program from scratch, leading a team of three that generated \$2.5M in pipeline (25% of total quota) in the first nine months.
- Conducted 500+ discovery calls and fed recurring customer problems directly into roadmap planning.
- Drove a 30% increase in feature adoption while maintaining 90%+ CSAT as one of four solutions architects handling L1-L3 escalations.

Jr. Solutions Architect & Product Owner of Training

Aug 2017 to Mar 2018

- Built the internal and external training program from the ground up (server provisioning, curriculum, scheduling), turning ad-hoc onboarding into a repeatable system that onboarded 100+ clients.

EDUCATION

Bachelor of Business Administration, Information Systems | Mike Cottrell College of Business, University of North Georgia