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Strategy & Operations Leader

Summary

Strategic Operations Leader with 10+ years driving cross-functional execution across diverse environments, ranging from agile 50-person nonprofits to global enterprises. Known for turning complexity into clarity, from aligning C-suite leadership on multi-year roadmaps to architecting 0-to-1 business systems. Delivers measurable outcomes through disciplined planning, AI-enabled execution, and a track record of building the infrastructure that makes organizations scale.

Core Competencies

Strategic Planning & Execution | 0-to-1 Business Execution | Foundational Infrastructure Design | Executive Decision Support | Cross-Functional Leadership | Change & Transformation Management | Stakeholder Engagement | AI & Automation | Organizational Development | Financial Planning & Budget Management | Vendor & Contract Negotiation | Enterprise Program Management | Data Analysis & Insight Generation | Organizational Design | Executive Communications | Risk Management | Operational Excellence

Professional Experience

Self Employed, Remote, CA | 2025 – Present

Independent Consultant

Managing contract engagements and independent projects spanning early-stage strategic execution, 0-to-1 operational infrastructure, and AI-powered workflow automation.

- **AI-Powered Automations:** Developed lightweight workflow tools utilizing Claude Code and API integrations (Slack, Google Sheets) to streamline complex administrative routines, featuring persistent state tracking and a cron-scheduled CLI.
- **Early-Stage Strategic Execution:** Partnered with executive leadership to drive foundational business initiatives, developing comprehensive capital deployment and talent acquisition models alongside detailed 6-month MVP engineering roadmaps.
- **0-to-1 Corporate Infrastructure:** Architected scalable operations to prevent early-stage chaos, implementing the core software stack (Notion, HubSpot, Slack) and establishing lightweight cross-functional processes across HR, IT, and Finance.
- **Proprietary Trading Systems:** Engineered custom financial applications to scan the S&P 500 and evaluate premium yields for options strategies, parsing live market data into a centralized dashboard to accelerate trade execution.

Dynatrace, Mountain View, CA | 2024 – 2025

(NYSE: DT) – \$14B+ market cap, software intelligence company, and global leader in AI-powered observability, serving thousands of enterprise customers with automated full-stack monitoring (5,000+ employees).

Lead Executive Administrator

Drove operational excellence across enterprise-wide Customer Success functions, partnering with senior leadership to design strategic programs, optimize budgets, and build the operational infrastructure to scale global engagement.

- **Financial Stewardship:** Proactively audited vendor contracts and corrected misallocated departmental charges, delivering \$450K in annual savings.
- **Global Program Management:** Planned and executed four cross-regional employee kickoffs across NORAM, EMEA, and APAC for 400+ attendees, managing \$550K in budgets and owning all global content and decisions.
- **Executive Sponsorship Program:** Designed a strategic relationship framework for 385 enterprise accounts, including executive-customer pairings and engagement playbooks to deepen C-suite partnership with key clients.
- **Team Leadership & SOPs:** Led the global administrative team for the Customer Success & Renewals business unit, setting priorities and building SOPs and templates to align support with core business objectives.
- **Operational Systems:** Rebuilt 80+ critical Microsoft Azure distribution lists with standardized governance rules and integrated regional lists with Slack to restore communication accuracy across global teams.

IGT, San Francisco, CA | 2022 – 2024

(NYSE: IGT) – PlayDigital is the gaming and sports betting division of IGT once valued at \$6B+ market cap, part of a gaming enterprise, delivering award-winning iGaming, digital lottery, and sports betting platforms across 100+ regulated markets (10,000+ employees).

Chief of Staff

Partnered with executive leadership to translate strategy into execution, establishing the complete quarterly OKR and KPI calendar to drive cross-functional accountability and achieve 91% measurable organizational alignment.

- **Enterprise Performance Architecture:** Implemented a company-wide OKR program for 800+ employees and contractors, reaching 91% alignment in 6 months via centralized training, 1:1 sessions with 87 managers, and the leadership of 21 OKR Champions.
- **Strategic Alignment & Execution:** Partnered with the CEO and executives to translate multi-year strategy into quarterly execution, driving cross-functional accountability and alignment on top priorities.
- **Unified Executive Dashboards:** Integrated Jira, Trello, and Microsoft Lists into Quantive, enabling near real-time visibility into strategic priorities and facilitating faster executive decisions.
- **AI-Enabled Operational Support:** Piloted and implemented AI-driven product capabilities in Quantive and built an internal AI Q&A bot with Microsoft Power Virtual Agents to reduce ad-hoc support requests and accelerate employee ramp-up.
- **Organizational Streamlining:** Increased program adoption and engagement while reducing meeting complexity by 30% through survey-driven improvements and refined messaging.

Pear Therapeutics, San Francisco, CA | 2019 – 2022

(NASDAQ: PEAR) – High-growth digital health startup once valued at \$1.6B+ market cap, pioneered the world's first FDA-authorized prescription digital therapeutics (reSET® and Somryst®), scaled operations to merge biotech with software, creating valued therapeutic assets later acquired (200+ employees).

Technical Program Manager

Directed cross-functional operations and Agile transformation for FDA-authorized digital therapeutics, establishing the scalable systems required to reduce release cycles by 60% while building systems that supported both delivery speed and organizational resilience.

- **Agile Release Optimization:** Led a comprehensive Scrum transformation across 8 cross-functional teams, reducing software release cycles from 3 months to 1.2 months across 21 releases.
- **Integrated Timeline Architecture:** Designed and implemented a Smartsheet-based release timeline tool to illustrate time, cost, and scope tradeoffs, achieving a 90% adoption rate across all company products.
- **Cross-Functional Compliance Coordination:** Partnered with Regulatory, Legal, and Engineering teams to ensure total FDA compliance for high-growth digital health products through rigorous risk assessment and dependency management.

- **Strategic Execution Support:** Unified product, regulatory, and design data into actionable delivery scenarios, accelerating executive go/no-go decisions and optimizing resource allocation.

Executive Assistant

- Directed the first end-to-end digital dispensing of a prescription digital therapeutic, managing technical integration with an external partner from physician consultation through prescription fulfillment.
- Established a standardized document management system in accordance with security guidelines and led procurement processes for engineering and product teams.
- Founded the Patient Advocacy Council and led the Employee Engagement Council during COVID-19, implementing 14 new initiatives and supporting 9 programs to strengthen patient voice, team cohesion, and productivity.
- Provided executive support to the VP of Engineering, VP of Product, and VP of Portfolio, serving as the primary liaison for cross-functional alignment, external partner coordination, and executive-level communications.
- Supervised logistics for offsites, in-office events, and remote hackathons and developed career ladders and communication materials to support professional growth.

Students Rising Above, San Francisco, CA | 2017 – 2021

Bay Area nonprofit supporting 2,000+ low-income, first-generation students, achieved a 90% college graduation rate (10+ employees and 50+ advisors)

Development Associate

- Partnered with the Development Director to scale fundraising from \$3.5M to \$10.8M by securing corporate sponsors, expanding donor relationships, and increasing grant revenue.
- Directed the \$1M annual gala for 500+ guests, managing 50+ staff/volunteers, implementing GreaterGiving for event management, and cutting post-event reconciliation from two weeks to two days.
- Managed and mentored a development intern, delegating core tasks and providing technical guidance to ensure all deliverables adhered to project standards and industry best practices.
- Led three major fundraising programs, the Rising Scholar program, annual gift campaign, and back-to-school campaign, cultivating new donors and strengthening retention among existing supporters.
- Implemented an integrated technology stack (GreaterGiving, Concur, DocuSign, eVoice) that reduced employee reimbursement processing time from 3 months to 1 month and decreased accounting resource needs by 80%.
- Leveraged Salesforce CRM to streamline donor communications, track engagement, and generate comprehensive fundraising performance reports for senior leadership.

Executive Assistant

- Provided strategic advisory support to the CEO and 18-member Board of Directors, prioritizing donor meetings and maximizing fundraising opportunities.
- Served as a proactive strategic partner, anticipating challenges, offering solutions, and providing analysis to support informed executive decision-making.
- Orchestrated board governance for quarterly meetings, including agenda preparation, meeting coordination, minute recording, and action item tracking.
- Crafted clear, concise communication materials for internal and external stakeholders, enhancing transparency, trust, and engagement.
- Managed all incoming stakeholder requests via website, phone, and mail channels, ensuring timely responses and accurate routing.

Collete & Career Advisor (Part-Time)

- College admissions advising, guided students through the college admissions process, financial aid submission, and scholarship requirements.
- Student support, served as a mentor and advocate for students, providing socio-emotional support and individualized action plans.

Selected Earlier Career

- Always Best Care, Roseville, CA | 2016–2017— Marketing Coordinator: Managed and trained two program representatives during the relaunch of the Always in Touch program and ran community campaigns, and produced KPI reports (SEO, ROI, call center).
- MassMutual, Walnut Creek, CA | 2014-2015 — Marketing & Operations Specialist: Managed brand ambassador and co-op marketing budgets for 100+ advisors, oversaw A/P, A/R, payroll, cash flow reporting, and day-to-day operations across 4 offices.
- WORLD PAC, Newark, CA | 2010-2014 — Marketing Specialist, Credit Administrator, Marketing Program Administrator: Ran national incentives and tradeshow (up to 2,000+ attendees), coordinated supplier marketing programs, administered S-Dial advertising, driving income growth of 175%+, managed credit operations, and new customer onboarding.
- Kimber Hills Academy, Fremont, CA | 2009-2010 — Accounting Assistant: Full-cycle A/P, vendor relations, petty cash controls, and 1099 support, and introduced stronger internal controls for reimbursements.

Board & Community Leadership

Board of Directors, Alumni Association, California State University, East Bay | 2021 – 2025

President: 2023 – 2023 | President-Elect: 2021 – 2023 | Board Member: 2020 – 2021

- Led governance, strategic planning, and alumni engagement for a 130K+ member network, partnering with university leadership to expand mentorship programs, launch alumni awards, and increase fundraising capacity.
- Oversaw board operations, budget planning, and partner negotiations, streamlining meeting structures and operational processes for greater efficiency.
- Represented the alumni body at high-visibility events, including university functions, community gatherings, and public speaking engagements to strengthen alumni–student relations.
- Profiles & Contributions
 - Featured in CSUEB Alumni Spotlight — California State University, East Bay
 - Quoted in Women’s History Month profile article — California State University, East Bay
 - Facilitator, Women on the Rise: Building Your Legacy series — California State University, East Bay
 - Recognized in alumni communications during Lifetime Alumni Member Appreciation events — California State University, East Bay

Child Advocates of Contra Costa County | 2018 – 2021

Team Lead: 2020 – 2021 | Court Appointed Special Advocate (CASA): 2018 –2021

- Appointed by a juvenile court judge after completion of extensive pre-service training, screening, and background checks, served as an Officer of the Court advocating for foster youth in legal proceedings.
- Represented the best interests of youth in court, ensuring educational, health, safety, and community resource needs were addressed in legal decisions.

- Led a team of volunteer advocates, coordinating casework, peer support, and guidance to consistently advance the best interests of children in care.

Education, Research, and Honors

Education

- Master of Business Administration (MBA) — Eastern New Mexico University (2022)
- Bachelor of Science (B.S.), Business Administration — California State University, East Bay (2008)

Honors & Distinctions

- Outstanding Academic Achievement — Delta Mu Delta International Honor Society in Business (2022) | Top 20% of MBA class
- Highest Honors — The Honor Society (2021) | GPA 3.8+
- SCLA Distinguished Scholar — Sigma Alpha Pi (2020) | GPA 3.7+

Selected Graduate Projects

- Statistical Analysis (Youth Unemployment): Designed a quantitative hypothesis test using OECD data to model the disproportionate economic impact of COVID-19 on youth populations. Applied z-tests and regression analysis to identify significant demographic trends.
- Financial Modeling (Xcel Energy): Built a 10-year revenue forecast and valuation model using Free Cash Flow (FCF) and WACC analysis to assess operational health and recommend strategic investments.

Graduate Research Experience — Eastern New Mexico University | 2021 – 2022

- Designed and implemented a university-wide survey on distance learning/online environments and synthesized results in PowerPoint for academic dissemination (Advisor: Dr. Mark Viner).
- Conducted literature review on the benefits of continuing education/professional development for practicing teachers (Advisor: Dr. Rebecca Davis).
- Compiled annotated bibliographies and organized the Education Department Research Assistance Group Notebook and conducted literature reviews and documented methodology in a shared digital notebook (Education Department).
- Hosted virtual office hours to support faculty and student research collaboration, tutored and advised students online via chat, forums, and video.

Tools & Platforms

- CRM & Database: Salesforce, HubSpot, Microsoft Access, GreaterGiving, Concur, DocuSign, QuickBooks, Blackbaud Financial Edge.
- Automation & Low-Code: Microsoft Power Automate, Power Virtual Agents, Microsoft Lists, SharePoint.
- AI & Development: Claude Code, Generative AI Prompting, Cursor, Lovable, Bold, GoDaddy Website Builder, WordPress, Microsoft Forms, Google Forms, Nano Banana, ElevenLabs.
- Project Management & Docs: Jira, Confluence, Smartsheet, Notion, Trello, Microsoft OneNote, Google Docs.
- Analysis & Strategy: Power BI, Workboard, Microsoft Excel, SurveyMonkey, Google Sheets, Tableau, Miro.
- Communication & Collaboration: Zoom (Webinar, Enterprise Admin), Microsoft Teams, Slack,
- Google Workspace, Loom, Fathom, Granola.
- Design & Whiteboarding: Canva, Figma, Mural, Xmind, Microsoft Whiteboard.

Certifications & Professional Development

- Certified ScrumMaster (CSM) — Scrum Alliance
- Six Sigma White Belt — Six Sigma Global Institute
- DeepLearning.AI (via Coursera) — Generative AI for Everyone (Instructor: Andrew Ng)
- Udemy: Medical Device Risk Management, Health Data 101, Introduction to Programming, Continuous Integration for Beginners, DevOps / CI/CD, Applied ISO 14971, Master Cognitive Biases and Improve Your Critical Thinking, Emotional Intelligence at Work
- Harvard ManageMentor — Strategic Thinking, Change Management, Leading People, and Innovation Implementation