

Lisa Patel

PRODUCT MANAGER

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EXPERIENCE

Upgrade, Inc.

San Francisco, CA

Product Manager II

June 2025 - Present

- **AI Support Agent - Home Improvement:** Led the launch of AI-powered customer support for Home Improvement, owning the borrower-facing chat and voice journeys. Built a testing program on real customer data that caught misrouting and AI hallucination errors before they reached customers, and drove the engineering fixes to launch.
- **Cross-Sell Growth & Monetization:** Co-led a company-wide cross-sell marketplace connecting ~3,500 merchants with ~2M Personal Loan and BNPL customers, letting them pre-qualify and apply through merchants and routing qualified leads to partners, unlocking a new revenue stream.
- **OCR & ID Verification:** Drove 50-60% adoption and 5% faster loan openings across ~85K applications by leading OCR integration in the loan funnel, letting borrowers scan their license once to prefill info and satisfy ID verification downstream.
- **Apply by Phone:** Launched a phone application channel (apply by phone, sign online), building the plan-specific agent scripts and compliance controls that made the phone experience legally match the online one.
- **Bidirectional Payments SMS:** Cut payment-request approval time from 90 to ~20 minutes with a secure two-way SMS channel letting borrowers approve or decline merchant-initiated payment requests by text, fraud and eligibility enforced on the backend.
- **Roadmap & Executive Alignment:** Prioritized the shared roadmap across growth, risk, and UX initiatives and drove end-to-end delivery, presenting tradeoffs and outcomes to VP-level stakeholders.

Product Manager I

Jan 2024 - June 2025

- **Disputes:** Led 0-to-1 delivery of borrower-facing dispute resolution workflows (automated emails, post-dispute statement updates, and audit logs), supporting ~500 monthly disputes while sharply reducing resolution time and operational ambiguity.
- **Refunds:** Owned end-to-end borrower servicing across disputes and refunds as team SME, extending the servicing suite by building refund workflows from scratch.
- **Customer Servicing:** Improved call resolution across ~1.5K monthly inquiries by delivering internal agent tools for payment due dates, autopay, and a savings calculator, reducing risk exposure.
- **Onboarding:** Cut signup time 35% by analyzing funnel drop-off, eliminating redundant verification steps, and adding a passwordless magic-link sign-in.

Associate Product Manager

Aug 2022 - Jan 2024

- **Pre-Launch Scaling:** Helped scale a pre-launch B2B2C product to ~\$2B in loan originations: partnered with engineering through blitz testing and iterative releases, ran feedback loops, and built executive KPI frameworks to track product health.
- **Merchant Servicing Platform:** Built an internal merchant servicing center enabling case-by-case configuration and customization, supporting ~2K merchants on the platform.

Blitz App, Inc.

San Francisco, CA

Product Data Analyst

Sept 2021 - July 2022

- **Retention & Growth:** Led cohort and funnel analysis to surface churn drivers and retention risks, informing experiments that improved engagement and retention.
- **Subscription Insights:** Automated reporting for MRR, LTV, CAC, and churn, enabling data-driven pricing and lifecycle decisions that increased customer lifetime value.
- **Revenue & Data Infrastructure:** Built data pipelines processing ~100M rows/day and analyzed pro vs. non-pro behavior with product, driving features that increased pro-tier conversion.

Okta, Inc.

San Francisco, CA

Data Science Analyst

Mar 2021 - Sept 2021

- Built product analytics dashboards and ML-driven insights on user search and engagement, shaping content strategy for knowledge-base articles and feature launches.

Gilead Sciences, Inc.

Foster City, CA

Data Scientist Intern

Apr 2020 - Dec 2020

- Built data pipelines and predictive models on large-scale healthcare claims to surface high-value user segments for go-to-market and product positioning decisions.

SKILLS

PRODUCT

Product Discovery, Roadmapping, A/B Testing & Experimentation, Specs & Requirements, Go-to-Market, Stakeholder Management, Agile

DATA & ANALYTICS

SQL, Python, Tableau, Google Analytics, BigQuery, Snowflake, Databricks

TECHNICAL

AWS, GCP, Azure, Docker, PySpark, MySQL, Postgres

EDUCATION

M.S. Information Systems

Santa Clara University, Leavey School of Business

Santa Clara, CA · 2021

B.E. Information & Communication Technology

Gujarat Technological University

Gujarat, India · 2019

PROJECTS

LayerTrip

Full-stack travel app that parses itineraries with the Claude API, geocodes hotels, and surfaces curated recommendations by proximity, generating a branded PDF guide per trip. React, FastAPI, Google Places/Geocoding, Anthropic API.

Resume Builder

Custom React + TypeScript resume template built with Cursor and AI. ATS-friendly, print-accurate, with overflow detection and a command palette. Open-sourced on GitHub.