

Tucker Lieberman

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Ascensus

Newton, Mass. Oct. 2006 – Oct. 2017

For 11 years, I worked on web-based products that help Americans save for college, charity, and retirement in tax-advantaged investments. The company builds online features and recordkeeping.

Product Manager, User Experience

Jan. 2015 – Oct. 2017

Worked with company leaders, relationship managers, business analysts, developers, testers, and marketers to make high-level decisions about the design of key products.

- In 2017, I designed the interface for an auto-enrollment retirement savings program for the State of Oregon, the first such program in the US.
- In 2015 and 2016, I redesigned existing features and designed innovative new features for 529 college savings plans according to a “responsive” model that adjusts to the size of the user’s screen, allowing customers to log in from their mobile devices.
- Using a content management system (CMS), I updated public websites for clients.

Testing Analyst, User Acceptance Testing

July 2008 – Jan. 2015

Developed strategies and performed tests to ensure error-free releases.

- Manage team’s monthly record of our testing status and stakeholder signoff
- Lead team’s review of quarterly statements and year-end tax forms
 - Traveled to the printer to quality-check on-site
- Perform front-end quality assurance and usability testing, focusing on:
 - Client service representative’s application and investor’s login experience
 - Downloadable and printed material including personalized confirmations
- Use in-house systems for ticketing and defect tracking (logging and re-testing at least 12 bug reports in an average month, plus re-testing many logged by others)
- Verify back-end data integrity with Tech
- Write and run SQL queries to find data for test cases
- Mentor junior employees as they navigate rapidly changing Tech builds

Project highlights:

- Led testing of plan rebranding while moving nearly \$1 billion to a new fund manager
- Sole usability tester on the elimination of a legacy platform
- Incoming conversion of over a dozen 529 plans from multiple states
- Fund openings, mergers and closures, including automatic allocation adjustments
- Launched incentive programs under State Treasury rules
- Recurring transaction instructions (dollar-cost averaging and recurring rebalances)
- Changing calculation of pro-rated allocations and fee assessment
- Electronic gifts from third-party bank and investment accounts
- Archiving old data in different parts of the database to speed page load time
- Modifying case logging, information displays, and approvals to empower representatives
- Redesign, regular enhancement, and maintenance of a platform for large-scale philanthropists

Client Service Representative, Client Services

Oct. 2006 - July 2008

- Data processed clients’ written requests, quality-checked the team’s processing, and approved financial transactions after the workday ended
- Supported new hires as the sole experienced employee on “second shift”

Awards and leadership development

- 2014: Ascensus Cornerstone Award nomination
- 2013: “Think Tank” Award for proposing an efficiency improvement
- 2013: “Thank U” Award for assistance closing out a competitor’s assets
- 2013: By invitation of senior management, helped plan design strategy for mobile devices
- 2013: Leadership training
- 2011: Management training

Coursework

Bentley University, User Experience Center	Waltham, Mass.	2015-2016
• Information Architecture in Web Design	• Designing the UX	
• Online UX Research Tools	• Content Strategy	

Conferences

UX Professionals’ Association (UXPA)	Boston, Mass.	2015, 2016, 2019
Bentley University “Face of Finance”	New York, N.Y.	2018
World Information Architecture Day	Boston, Mass.	2017

Licensing

Certified Professional, Usability and UX – Foundation Level (CPUX-F)	May 2019
International Software Quality Institute (iSQI)	
FINRA Series 7: General Securities Representative	May 2012

Coach Training

Easton Mountain	Greenwich, N.Y.	
• Alumni assistant to the new class of life coaches		March 2018
• Two-week intensive in-residence program		April and Oct. 2016

Education

M.S. Journalism (Int’l Security), Boston University	Boston, Mass.	Jan. 2005
U.S. Army civilian employee (intern)	Fort Knox, Ky.	July/Aug. 2004
Produced an internal newspaper for the summer ROTC program,	Leaders Training Corps.	
B.A. Philosophy, Brown University	Providence, R.I.	May 2002