

# CLAIRE WANG LIU

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## EDUCATION

### THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

*Master of Business Administration; Majors in AI for Business and Business Energy, Environment, & Sustainability*

2025-2027

- Wharton Merit Based Fellowship: scholarships for exceptional professional, academic, and personal achievement; GRE: 330
- Activities: VP Communications Social Impact, Consulting Club, AI & Analytics Club, Follies (Wharton Musical), Wharton Hockey

### UNIVERSITY OF CALIFORNIA, BERKELEY

Berkeley, CA

*Bachelor of Science Industrial Engineering & Operations Research, Bachelor of Science Business Administration*

2017-2021

GPA 3.78; Management, Entrepreneurship & Technology (M.E.T.) Program Founding Class

- Dean's List: College of Engineering and Haas School of Business, Diane L. and David F. Grimes Scholarship
- Leadership: Sigma Eta Pi President - Created social impact chair and startup symposium event, GlobeMed VP, Institute of Industrial and Systems Engineers VP - raised \$2,575 in one semester for engineering department via merchandise sales (50% gross margin)

## EXPERIENCE

### JP MORGAN CHASE

New York, NY

**Senior User Experience (UX) Designer**

2022-2025

#### Leadership and Cross-Functional Collaboration

- Led UX design for 4 digital transformation workstreams in ConnectWealth, an account platform enabling advisors to manage billions; prioritized competing requirements and coordinated phased rollouts to facilitate national launch with \$486B+ AUM in 124k+ accounts
- Organized cross-functional workshops for ConnectWealth workstreams with product, engineering, and design leads to clarify problem statements, align priorities, and establish shared platform direction; reduced meetings by 20% and redundant feedback loops by 50%
- Advised and coached 5 executive product directors in the Private Bank, guiding them through agile product development and metrics-driven problem framing; empowering cross-functional teams to build scalable solutions and a unified platform experience

#### Analytics and Process Improvement

- Analyzed advisor workflow inefficiencies in ConnectWealth by mapping end-to-end processes, quantifying time delays, and testing redesign hypotheses; delivered a 70% reduction in proposal creation time, enabling 8.5k+ advisors to deepen client relationships
- Designed and implemented new documents exchange application experience by streamlining workflows and developing an intuitive, easy-to-understand interface, reducing document submission time by 93% from 5 minutes to 20 seconds, utilized by 3.5k+ advisors
- Created 5 usability tests within 6 months to validate advisor document experience; synthesized qualitative user feedback and data into actionable product requirements with 100% user satisfaction rate and endorsement from Head of Private Bank Digital

#### Mentorship and Institutional Development

- Planned and publicized 3 mentorship and networking events in NYC office as site lead for Women on the Move; attracted 100+ people and strengthened community across technology, product, and marketing teams
- Partnered with nonprofit clients to create the [Global Non-Profits' guide](#) through JPM's Force for Good program; led website design and rebranding for interactive tool where users input criteria to find countries to relocate to; transforming a static resource into a platform that empowers human rights defenders, applauded by the UN Special Rapporteur on the rights to freedom of peaceful assembly
- Advocated for accessibility as IAAP Certified Professional, promoting inclusive design standards across internal JPMC platforms; established design standards, embedded accessibility reviews in workflows; improved compliance to web guidelines by 25%

### BANK OF AMERICA

San Francisco, CA

**Experience Design Analyst**

2021-2022

- Conducted root-cause analysis of low engagement in Merrill Guided Investing ESG portfolio; identified misaligned content hierarchy and misconceptions about ESG investing, recommended redesign that boosted traffic 2.6x
- Launched and synthesized data from a 150-respondent survey, combined statistical page analytics with competitor benchmarking to curate insights on customers' reactions to ESG, implemented product repositioning to mitigate ESG misconceptions
- Partnered with engineering and product managers to launch new design for Merrill Benefits Online retirement tax profile feature, delivering multi-jurisdictional tax profiles for stocks and grants to 500k users

### SENDHELP Chatbot that directs people to non-police alternatives in non-emergencies

Berkeley, CA

**Co-founder**

2020-2021

- Achieved 80% click-through rate and 400 runs in under 1 year with 55 subscribers; demoed to Berkeley Fire Department, received letter of intent to pilot from City of Berkeley Councilmember, awarded grand prize finalist (\$10k) of UC Berkeley Big Ideas Contest
- Organized theory of change model to identify causes of police violence, interviewed and conducted 7 usability tests with police department, city response services, and social welfare to discover residents are unaware of emergency response alternatives

## ADDITIONAL INFORMATION

**Leadership:** Develop for Good (Mentor) - Educated and advised university students developing products for nonprofits, Heart Math Tutoring - taught 2 elementary school students, both showing growth from pre- to post-tutoring assessments and meeting program goals

**Interests:** Spanish and Mandarin (online student), sewing/altering clothes, yoga, swimming, boardgame nights organizer

**Certifications:** International Association of Accessibility Professionals Certified Professional in Accessibility Core Competencies