

PHILIP MORALES

Global Chief Transformation Officer

Enterprise Transformation Agenda & Roadmap · Operating-Model Redesign · Transformation P&L & Quantified Value · CEO & Board Alignment
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MASTER RESUME — full content inventory. Tailored versions are cut down from this document, never rebuilt from another file.

EXECUTIVE PROFILE

Transformation executive who owns large-scale, multi-region transformation across complex global enterprises, with deep operating experience in healthcare payers, provider enablement, and value-based care delivery. Sets and drives the enterprise transformation agenda end to end — operating-model redesign, digital and process modernization, cost and margin programs, and cultural change — translating strategy into measurable, sustained results. Owns transformation economics: cost, margin, and productivity targets delivered as quantified value, governed by clear key performance indicators and executive-ready reporting. Builds the machinery that makes value stick: named decision rights and authority thresholds, executive council and steering cadences, stage-gate discipline, risk registers, and outcome dashboards across multi-business-unit, multi-vendor estates. Trusted by chief executives, boards, and regional leaders for board-ready communication, an unvarnished view of risk, and adoption that makes change stick.

TRANSFORMATION VALUE DELIVERED

- \$2B+ transformation portfolios directed — multi-region programs spanning operating model, technology, and operations, governed to measurable financial outcomes.
- \$1B managed-services operating model built and scaled — standardized service models, governance, and key performance indicators delivering 50%+ cost reduction per process area with quality and compliance intact.
- \$700M operations transformation grown to \$2B in scope — approximately 2,000 agents across five delivery centers in four countries; 33% cost reduction, customer satisfaction to 72%, +10 Net Promoter Score.
- \$300M+ profit and loss owned — 20% year-over-year growth and a 6-point margin improvement through disciplined pricing, prioritization, and operating-model redesign.
- 40–60% cost reduction in target processes — enterprise process redesign and automation deployed into governed production across regulated industries, achieved by redesigning the process first and automating what remained.
- Member advocacy operating model designed and deployed across Commercial, Medicare, and Medicaid and into three health services businesses — 10%+ shift of member interactions from voice to digital channels.

CORE COMPETENCIES

Global Transformation Agenda & Roadmap · Multi-Region, Multi-Business-Unit Portfolio Ownership
Enterprise Operating-Model Redesign · Efficiency, Speed & Scale Across Functions and Geographies
Transformation Profit and Loss · Cost, Margin & Productivity Targets · Quantified Value Realization
Enterprise Artificial Intelligence Strategy · AI Governance & Operating Model Design · AI Portfolio Execution
Executive Council & Steering Committee Leadership · Decision Rights & Authority Thresholds · Stage-Gate Discipline
Payer & Provider Operating Models · Value-Based Care & Risk-Based Delivery · Medicare, Medicaid, Commercial & Individual Exchange
Interoperability, Fast Healthcare Interoperability Resources (FHIR) & Application Programming Interface Strategy
Data Aggregation & Semantic Layer · Clinical, Operational & Financial Outcome Measurement
Intelligent Automation & Center of Excellence Design · Managed Services & Business-Process-as-a-Service Strategy
Change Leadership, Adoption & Cultural Transformation · Chief Executive, Board & Investor-Ready Communication
Vendor & Managed-Service-Provider Governance · Regulatory, Compliance & Audit Readiness

PROFESSIONAL EXPERIENCE

DIGITAL INTELLIGENCE ADVISORY SERVICES (DIAS) • Ponte Vedra, FL

Founder & Principal Jun 2026 – Present

Independent healthcare advisory practice serving payers, providers, health-technology firms, and investors.

- Founded and operate an independent healthcare advisory practice advising on artificial intelligence strategy, operating-model design, and enterprise transformation.
- Advise on buy-side and expert-network engagements covering payer software evaluation, product and platform assessment, and leadership diligence, delivering written evaluation summaries under defined engagement terms.
- Author of the Interoperability Tariff Executive Research Series and The Adoptiv Method, translating field problems in healthcare data fragmentation and governed artificial intelligence autonomy into repeatable client frameworks.
- Direct the Vitruvian Health platform thesis and Compass IQ command-center concept, covering data aggregation and semantic layer design, canonical modeling, and governed human-in-the-loop autonomy.

DAMCO GROUP • Jacksonville, FL

Global Vice President, AI & Digital Transformation Jun 2025 – Jun 2026

Reported to the Global Chief Executive. Built and scaled a global artificial intelligence and digital transformation capability, operating model, and offering portfolio from a blank slate.

- Led launch of a healthcare artificial intelligence and digital practice focused on providers and integrated delivery networks, generating \$1.5M+ in first-year revenue, expanding partner artificial intelligence offerings to \$2M+ in managed services value, and building \$800K+ in qualified pipeline.
- Defined productized managed services and artificial-intelligence-enabled business-process-as-a-service offerings, establishing standardized service and operating level agreements, control frameworks, and operating policies that improved delivery predictability and reduced variance in service performance by 20%+.
- Built multi-year growth plans, unit economics models, and portfolio-level budgets, aligning gross-margin targets and capital allocation with C-suite strategy to support scalable, repeatable offerings for payer and provider clients.
- Orchestrated cross-functional pursuit and transition motions across Sales, Business Development, Solution Architecture, and Delivery, reducing time from deal closure to steady-state operations by an estimated 30–45 days.
- Established executive governance cadences (quarterly and monthly business reviews), key performance indicator dashboards, and risk registers that improved portfolio visibility, accelerated decision-making, and reduced issue-resolution cycle times by 25%+.

ELEVANCE HEALTH (ANTHEM) / CARELON • Indianapolis, IN — Remote

Enterprise Transformation & AI Executive Dec 2020 – Jun 2025

Enterprise transformation across a Fortune 25 organization and its Caredon business units. Led 6 direct reports and 40+ cross-functional stakeholders; influenced \$50M+ in investment.

- Part of the executive team that defined the enterprise member-advocacy strategy, then led design and planning of the advocacy and digital transformation programs across Commercial, Medicare, and Medicaid lines of business, and deployed the operating model into the Caredon health services businesses — CaredonRx pharmacy benefit management, Caredon Medical Benefits Management, and Caredon Behavioral Health — aligning architecture and governance to payer regulatory and compliance standards.
- Architected a Fast Healthcare Interoperability Resources (FHIR) based interoperability backbone and application programming interface strategy to support Centers for Medicare and Medicaid Services interoperability and prior-authorization mandates, creating a reusable data foundation across claims, clinical, behavioral, pharmacy, and social-determinants-of-health domains.
- Implemented artificial-intelligence-enabled intelligent routing, predictive analytics, and multi-carrier integrations, achieving a 10%+ channel shift from voice to digital while improving member experience and cost-to-serve metrics across priority segments.
- Translated advocacy strategy into a target-state service and clinical operating model, enabling whole-person views and next-best-action capabilities that reduced manual handoffs and improved first-contact resolution for complex member needs.
- Redesigned operating models across clinical, operations, technology, legal, risk, and finance, unifying them into one integrated, data-driven governance model and clearing long-standing decision-rights bottlenecks on high-risk interoperability and artificial intelligence initiatives.
- Moved artificial intelligence and automation into governed production on a modern data foundation, driving adoption through disciplined change management.
- Established operating policies, standard operating procedures, quality-assurance automation, and compliance reporting frameworks that reduced agent attrition, strengthened audit readiness, and gave executives transparent dashboards on federal and state compliance posture.

AUTOMATION ANYWHERE INC. • Boca Raton, FL

Senior Director, Global Strategic Accounts Executive Jul 2018 – Nov 2020

Global artificial intelligence and intelligent-automation software company. Led a team and a \$50M+ portfolio across healthcare and financial services.

- Led enterprise-scale robotic process automation and intelligent automation programs for payer and provider clients, owning pursuit-to-renewal lifecycle, program economics, and savings realization for multi-million-dollar managed services engagements.
- Engineered automation operating models, service level agreements, and control plans that delivered 40–60% cost reduction in target processes — driven by redesigning the process first and automating what remained — while strengthening compliance, auditability, and fraud-detection capabilities.
- Created and implemented a user-led center of excellence in a federated model, with business users building inside defined guardrails and technology owning the platform, controls, and release path, increasing automation reuse and preventing fragmented pilots across business units.
- Advised Fortune 500 payers, providers, and financial institutions on automation strategy, enterprise roadmaps, and change management, helping clients prioritize use cases with the highest regulatory and economic impact.
- Designed governance frameworks, risk controls, and operating procedures for automation centers of excellence, reducing time to production and increasing the proportion of automations moving from pilot to scaled deployment.

- Developed financial models and business cases that quantified anticipated cost savings, quality improvements, and risk reduction, enabling C-suite sponsors to secure investment approvals and track realized return against plan.
- Directed complex negotiations on scope, pricing, commercial terms, and risk allocation, securing multi-year renewals and expansions that increased annual recurring revenue and extended contract value by double digits.
- Governed third-party and global-delivery execution against performance, security, and regulatory requirements, reducing incident rates and service level breaches and protecting clients from multimillion-dollar penalty exposure.
- Partnered with chief information officers, chief technology officers, and chief operating officers to align automation roadmaps with core-system modernization and data-platform strategies.

GLOBAL DIGITAL TRANSFORMATION SERVICES (GDTS) • Jacksonville, FL

Founder & Managing Principal Nov 2016 – Jul 2018

Independent digital transformation advisory and technology venture — an owned limited liability company and the predecessor to DIAS.

- Founded and ran the firm end to end — operating model, offerings, governance, and go-to-market — driving digital, artificial intelligence, and automation transformation strategy for enterprise clients.
- Advised healthcare, manufacturing, retail, and financial services clients on operating-model redesign, managed services transitions, and digital growth roadmaps, identifying double-digit efficiency opportunities and margin expansion levers.
- Designed customer and member strategies, segmentation models, and journey frameworks that improved program adoption and portfolio profitability, supporting 10–20%+ improvements in utilization of digital and self-service channels.
- Guided executive teams through vendor-selection and sourcing strategies for multi-tower managed services, reducing transition risk and enabling contractual constructs aligned to outcome-based performance metrics.

CISCO SYSTEMS • Ft. Lauderdale, FL

Director, Enterprise Portfolio & Program Leader Jun 2014 – Oct 2016

Reported to the Vice President, Americas Enterprise. Led 30 direct reports and 50+ virtual team members; owned a \$300M+ portfolio and profit and loss across South Florida enterprise accounts, with healthcare as the primary focus.

- Directed an enterprise division delivering managed services and digital transformation solutions to Fortune 500 healthcare and financial customers, overseeing program operations, sales execution, and financial performance.
- Executed strategic and tactical account plans that drove \$300M in annual revenue, delivering 20% year-over-year growth and improving portfolio profit margin by 6 percentage points through disciplined pricing and deal governance.
- Led 15 sales executives and 15 solution engineers, converting the team from product selling to consultative transformation selling on MEDDIC and Challenger methodologies, hiring senior sales talent and expanding the offering set.
- Led multi-tower managed services and technology-refresh programs across network, collaboration, security, and data center, reducing client run-rate operating costs while increasing contract stickiness and renewal likelihood.
- Implemented forecasting, pipeline, and governance rigor that improved revenue predictability and reduced quarter-end volatility, enabling more accurate resource planning and investment decisions.

IBM CONSULTING • Boca Raton, FL

Senior Client Global Transformation Leader Jun 2008 – Jun 2014

Global transformation leadership across multiple countries and regulatory regimes. Owned a \$900M+ portfolio and engagements up to \$1B; led 200+ resources across five delivery centers.

- Directed a global customer-operations transformation for a multi-brand automotive manufacturer that grew from \$700M to \$2B in scope, spanning approximately 2,000 customer service representatives across five international centers in four countries, delivering a 33% cost reduction, a 10-point Net Promoter Score increase, customer satisfaction improvement to 72%, and a 5% reduction in lawsuits.
- Held the managed-service-provider function on that program, governing four tier-one business process outsourcing providers and the technology teams supporting them; resolved a \$10M service level penalty exposure by renegotiating an ambiguous contract term and offsetting it against client-originated service downtime, securing a full write-off.
- Led a \$1B managed services implementation for a global enterprise, achieving 50%+ cost reduction per process area through labor optimization, standardized procedures, and automation while securing a \$30M contract extension based on performance.
- Managed a \$900M transformation and outsourcing portfolio, reducing costs by \$15M+ through process consolidation, sourcing optimization, and operating-model redesign across finance, human resources, and customer operations.
- Consolidated shared services for a global building-materials leader across six end-to-end process towers — procure-to-pay, order-to-cash, record-to-report, hire-to-retire, acquire-to-retire, and design-to-cost — for 900+ staff across thirteen countries, and led the commercial restructuring of the agreement from a ten-year to a five-year term.
- Architected and implemented multi-tower managed services across applications, infrastructure, contact centers, and back office with clear responsibility assignment models, risk registers, and key performance indicator frameworks, improving governance maturity and audit readiness.

- Ran executive governance, north-star metrics, and real-time dashboards, building and sustaining relationships across chief financial officer, chief operating officer, chief information officer, and country-lead stakeholders in Europe, Latin America, and Asia, aligning transformation roadmaps with local regulatory, labor, and cultural realities.

SELECTED THOUGHT LEADERSHIP

- Author, Interoperability Tariff Executive Research Series — a three-paper body of work on the hidden cost of fragmented healthcare data, governed write-back autonomy, and the member advocacy gap.
- Author, The Adoptiv Method — a governed artificial intelligence operating model, and the Write-Back Autonomy Ladder, a tiered framework defining where an artificial intelligence system may read, recommend, or act, and which controls each tier requires based on clinical and financial blast radius.
- Named co-inventor, United States Patent 7,885,848 B2 — resource optimization for business transformation outsourcing with reoptimization on demand (assigned to IBM, granted 2011).

LANGUAGES

Works in English, Spanish, and Portuguese. Led delivery across Latin America, the Philippines, and the Nordics. English is primary.

PROFESSIONAL CERTIFICATIONS

- IBM — E-Commerce Business Strategy: Customer Engagement & Digital Strategy
- IBM — Executive Leadership & Project Management
- Massachusetts Institute of Technology — Venture Mentoring Program: Venture Development & Operations
- Customer Operations Performance Center — Customer Experience Optimization & Efficiency

EDUCATION

- Lindenwood University — Master of Science (MS), Management Information Systems
- Saint Louis University — Bachelor of Science (BS), Aeronautics