ERIC BRANCH

Operations Leader · Insurance and Benefits Administration

CONTACT

Oldsmar, FL · contact@ericbranch.dev · linkedin.com/in/ericbranch · ericbranch.dev

Twenty years in insurance and benefits administration. Currently leading delivery with a 20-person team of project managers, business analysts, and quality analysts across 30 to 40 projects per year for more than 30 clients.

SELECTED OUTCOMES

Automation & Delivery

- Built a proof of concept automating product setup, cutting effort from roughly 40 hours and $2,000 per instance to under 5 minutes and less than $2.
- Coordinated 851 production changes in 2025 at a deployment issue rate under 3%, across more than 30 clients.
- Increased on-time delivery 43% and cut ticket backlog 87% in six months by forcing prioritization: deciding what would actually get done, and closing anything untouched in 18 months.
- Compressed the new-state launch cycle from 60 days to 30 by redesigning the process and standardizing requirements intake.

Financial Governance

- Automated statement-of-work invoice reporting and built a historical billing dashboard, giving leadership visibility into billed work by client and product.
- Integrated ticketing with billing, allowing billable work to flow into invoices. Revenue per billable ticket rose 8% and approval time fell 50%.
- Produced monthly, quarterly, and annual P&L reporting and recommended maintenance pricing changes to meet profitability targets.
- Halted a long-running development project after an ROI analysis showed maintenance cost would exceed best-case revenue and margin projections.

EXPERIENCE

07/18 to Present
Clearwater, FL

Insurance Administrative Solutions

Director, Change Management — 11/23 to Present

Lead a 20-person team and own the operating cadence: intake, portfolio status for leadership, client governance, change advisory board, deployment planning, and defect triage.

- Write statements of work and track time against estimate to assess project profitability and improve estimate accuracy.
- Re-engineered member rate and premium change processes with automated workflow, improving quality, documentation, and SOC audit reporting.
- Designed the migration of legacy configuration data to SQL to enable development of a modular administration platform.

Manager, Change Management — 07/18 to 11/23

- Agile product owner for a business rules engine, client portals, and portions of the administration platform build.
- Implemented 6 new clients end to end: admin and claims systems, three portal types, online application, correspondence, and FTP, ETL, vendor, and SSO integrations.
- Re-engineered requirements intake into three phases and pushed requirements to task level with reusable templates, cutting testing defects with each implementation.

02/16 to 05/18
Clearwater, FL

WLT Software

VP of Operations

SaaS claims and benefits administration. Owned service delivery and support, vendor selection and contract negotiation, product pricing, infrastructure, and client escalations.

- Built an end-to-end service desk and workflow platform in Autotask, integrated with QuickBooks and ADP, automating routing to eliminate misdirected tickets.
- Implemented hardware refresh cycles and negotiated a new data center hosting contract with new equipment, lower cost, and an improved uptime SLA.
- Created and filled the product manager role and built a tracked three-year product roadmap.

07/15 to 02/16
Clearwater, FL

Insurance Administrative Solutions

Project Manager and Business Analyst, Consultant

Engagement extended past its original contract, with a full-time offer.

- Implemented a Cisco enterprise phone system on schedule, with Calabrio recording aligned to HIPAA retention for audits.
- Built a call center performance report covering speed to answer, hold time, and volume by department down to the employee, exposing staffing imbalances and driving SLA improvement.

02/15 to 06/15
Tampa, FL

Tampa General Hospital

IT Project Manager, Consultant

E-signature modernization and ERP integrations.

- Launched a campus-wide e-signature program, identifying hardware options that saved more than $150,000 against a $750,000 budget.
- Drove ERP workstream delivery across multiple vendors and applications with PeopleSoft integrations, with scope expanded after early progress.

10/05 to 02/15
Tampa, FL

HealthPlan Services

Advanced from frontline sales through people leadership into IT delivery

Project Manager — 06/12 to 02/15

- Managed the full lifecycle of a .NET workflow application delivering process visibility, an audit trail, and automated work distribution. Adopted as the standard for all clients.

Business, Data, and Quality Analyst — 04/11 to 05/12

- Co-designed a rate-combination testing tool that virtually eliminated rate-related defects and resolved rate discrepancies with client actuaries.

Manager, Supervisor — 02/07 to 03/11

- Managed more than 20 inside sales, case implementation, and clerical staff.
- Met all monthly SLAs, avoiding contractual penalties of up to $25,000.
- Negotiated rate and benefit concessions directly with client actuaries on behalf of regional field sales, and audited case setup to reduce billing and claim errors.

INDEPENDENT WORK

- **40 Hours to Under 5 Minutes.** A product approval goes in, a configured enrollment tool comes out. demo.ericbranch.dev
- **CoverageFit and CoverageDesk.** Evaluate commercial insurance policy documents against job requirements, find the gaps, and cite them in the source documents.
- **Navigator.** A private coach for navigating situations in the workplace.
- **Evergreen.** Complete product design: agents that replace a marketing and video team for a small business owner.
- **EvenBid.** User journeys, workflow, business plan, and feasibility for a startup.
- **Defining AI Transformation and the Architecture to Achieve It.** MBA capstone. thesis.ericbranch.dev

EDUCATION AND CREDENTIALS

Education

MBA, University of South Florida, Muma College of Business, Executive Program

BA, University of Central Florida, Psychology, Industrial/Organizational focus

PMP, Project Management Professional
ITIL, IT Service Management
CSPO, Certified Scrum Product Owner

Tools

Claude Code, Claude Platform, Google AI Studio, Copilot Studio, AWS, Bedrock, GitHub, Vercel, Render, Neon

Jira Data Center (administrator), Autotask (administrator), Salesforce (administrator), SharePoint (administrator), M365 (administrator), Zephyr (administrator), Power Automate, Power BI, SQL