

SWADHA PATEL

STRATEGY | OPERATIONS | ANALYTICS | AI

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Strategy and operations professional combining commercial analysis, financial modeling, AI implementation, and cross-functional delivery across enterprise technology, startups, and local businesses. Translates complex questions into practical decisions and execution.

PROFESSIONAL EXPERIENCE

Independent AI Strategy & Operations Consultant

May 2026 - Present | Houston, TX

- Advised 5+ businesses on AI strategy, evaluating 15+ operational workflows and prioritizing opportunities based on time savings, implementation effort, and expected business value.
- Designed and supported the implementation of 8+ AI-enabled workflows across administration, customer engagement, marketing, and reporting.
- Eliminated an estimated 40+ hours of repetitive work per month across client businesses by streamlining content development, customer follow-ups, research, and routine administrative tasks.
- Developed implementation roadmaps and adoption guidance for 10+ owners and employees, helping teams incorporate AI tools into their existing processes.

alliantgroup | Strategy Associate · Technology & Consulting

Nov 2025 - May 2026 | Houston, TX

- Identified revenue opportunities exceeding \$800K by analyzing client portfolios and prioritizing high-potential prospects.
- Improved pipeline visibility and forecasting by building Salesforce dashboards tracking deal progression, conversion, and account priorities.
- Strengthened account visibility and reduced follow-up gaps by standardizing client data and reporting workflows across sales and operations.

Rose AI | Client Lead / Project Manager

Sep 2024 - Nov 2025 | San Jose, CA

- Increased enterprise adoption by 30% across \$2M+ accounts by owning AI use-case discovery, requirements, KPI definition, and go-to-market execution.
- Raised project success from 70% to 95% by coordinating Agile delivery across engineering, design, customer success, and 10+ stakeholders.
- Shortened implementation timelines to under 6 weeks by standardizing onboarding, user acceptance testing, and AI workflow validation.
- Improved customer satisfaction by 12% by analyzing usage and feedback with SQL and Power BI to prioritize product improvements.
- Enabled 3+ enterprise deals and 6+ AI feature launches by leading solution evaluation, demos, requirements, and launch coordination.

CORE SKILLS

Strategy & finance: Corporate strategy, market entry, GTM, opportunity sizing, financial modeling, ROI analysis, competitive analysis. Product & operations: AI use-case evaluation, product roadmaps, requirements, Agile delivery, UAT, process improvement, workflow automation. Analytics & tools: SQL, Python, R, Excel, Power BI, Tableau, Salesforce, Jira, Confluence, generative AI.

PROFESSIONAL EXPERIENCE, CONTINUED

Intel | Strategy Consultant

Dec 2023 - May 2024 | San Jose, CA

- Supported an estimated \$2B revenue-growth opportunity by analyzing 50+ datasets with SQL to assess AI use cases and integration needs.
- Developed recommendations targeting a 40% improvement in customer satisfaction by analyzing customer friction points; the figure was a target, not a realized result.
- Informed executive go/no-go decisions by building ROI models, business cases, and leadership presentations.

MulticoreWare | Product Analyst

Jun 2023 - Dec 2023 | San Jose, CA

- Identified market opportunities exceeding \$100M by benchmarking 20+ competitors and evaluating 14 customer and industry segments.
- Recommended improvements targeting a 15% increase in product performance by analyzing market signals and customer feedback; the figure was a target.
- Identified 15 partnership targets across 4 U.S. regions by assessing Industry 4.0 and smart-health ecosystems.

Charge EPC | Business Analyst Associate

May 2023 - Sep 2023 | Concord, CA

- Contributed analysis supporting a \$1M valuation increase by evaluating ERP optimization and enterprise data initiatives.
- Improved reporting efficiency by 30% by building Power BI dashboards and standardizing executive KPI reporting.
- Improved operational visibility by mapping process bottlenecks and streamlining ERP-enabled workflows.

SELECTED PROJECTS

FinTech Checkout Optimization

- Built an interactive checkout funnel and A/B-test dashboard using illustrative data, confidence intervals, device segments, and contribution scenarios.

YouTube Engagement Analysis

- Built an interactive dashboard comparing traffic-source and device segments using weighted engagement metrics and conditional watch-time scenarios on illustrative data.

Market Entry & Product Roadmap

- Developed an 18-month roadmap across 3 releases by sizing a \$50B+ market and prioritizing customer segments and go-to-market initiatives.

Independent Finance & Energy Models

- Built 3 explorable models covering DCF valuation, cohort unit economics, and Houston energy capital allocation using transparent illustrative assumptions.

EDUCATION & CERTIFICATION

San Jose State University | B.S. Business Administration, Business Analytics

May 2024 | GPA 3.8 | Magna Cum Laude | Business Honors | President's Scholar | Dean's Scholar

IBM Certified AI Product Professional