

Rick Imai

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Executive Summary

Director-level portfolio and program management executive with 20+ years building Project Management Offices from the ground up and leading enterprise portfolios across technology-driven organizations. Proven track record establishing governance frameworks, operating rhythms, and planning cycles that drive predictable delivery while preserving organizational agility. Expert at translating strategic initiatives into measurable business outcomes through resource optimization, portfolio prioritization, and executive stakeholder partnership.

Core Competencies

Portfolio Management • PMO Leadership & Operations • Resource Planning & Capacity Management • Strategic Planning & Execution • Governance Frameworks • Capital & Headcount Planning • Investment Prioritization • Team Leadership & Hiring • Performance Measurement (OKRs/KPIs) • Executive Stakeholder Management • Multi-Year Transformation Programs • Operating Rhythms & Planning Cycles

Professional Experience

Amazon Web Services (AWS) | San Diego, CA

Senior Technical Program Manager—Security Data Platforms | Feb 2024 - Present

Lead portfolio planning and execution across 10+ engineering teams supporting enterprise-scale platform spanning 37 AWS regions. Establish intake processes, capacity planning models, and prioritization frameworks enabling data-driven resource allocation and strategic alignment.

- Lead Amazon's annual OP1 portfolio planning cycle, driving headcount and capital allocation across multi-year infrastructure programs to align with strategic priorities, operational needs, and budget constraints
- Manage \$80M enterprise infrastructure portfolio, optimizing investment decisions and resource utilization across storage, compute, and query platforms through data-driven capacity planning and cost-efficiency analysis
- Establish OKR and KPI frameworks providing executive visibility into portfolio health, risks, dependencies, and strategic progress across distributed teams
- Drive continuous portfolio optimization, reviewing program intakes weekly, reassessing priorities, and shifting resources to balance delivery capacity with evolving business demands
- Maintain executive visibility and alignment through weekly portfolio reviews and scenario planning, ensuring tradeoffs and resource shifts remain connected to organizational priorities

Amazon Stores | Irvine, CA

Senior Technical Program Manager—FinTech | Jul 2021 - Feb 2024

Lead portfolio planning and resource optimization for 200+ engineering organization across 8 teams. Partner with finance stakeholders on annual planning cycles, resource forecasting, and investment prioritization aligned to strategic business objectives.

- Directed portfolio of finance automation and reporting initiatives supporting P&L modernization, ensuring programs delivered within scope, timeline, and budget constraints
- Led annual headcount and capacity planning, balancing KTLO, strategic, and below-the-line initiatives to optimize resourcing and cost efficiency across organization
- Authored 3-year technology strategy influencing VP-level roadmap decisions, balancing strategic platform investments with operational demands through data-driven business case development
- Partnered with product, science, and engineering leadership to align multi-year investment roadmaps with business objectives and financial targets

Charles Schwab & Co., Inc. | Westlake, TX

Managing Director—Technology Portfolio Governance & Strategy | Mar 2019 - Apr 2021

Built Schwab's Technology Portfolio Management Office from the ground up, establishing governance frameworks, operating rhythms, and prioritization mechanisms for \$50M+ portfolio spanning 50+ initiatives. Led team of 15 FTEs (5 Portfolio Managers, 7 BI Engineers, 8 TPMs).

- Directed \$25M+ enterprise technology portfolio of 50+ initiatives spanning risk management, infrastructure modernization, and compliance programs
- Hired and led team of 5 Portfolio Managers and 8 Technical Program Managers, establishing operating model and performance frameworks while fostering culture of accountability and continuous learning
- Drove annual planning cycles and investment prioritization partnering with CISO and senior leadership, ensuring initiatives advanced strategic priorities while meeting regulatory obligations
- Authored three-year technology strategy and operating plan, improving visibility into portfolio performance and executive reporting to the Board
- Produced executive dashboards and OKR reporting providing clear visibility into progress, risks, dependencies, and strategic trade-offs
- Partnered with HR, finance, and procurement on staffing forecasts, vendor planning, and workforce development initiatives

Experian PLC | Allen, TX & Costa Mesa, CA

Sr. Portfolio Director, Global PMO—Enterprise Technology Programs | 2014 - 2019

Built and led Global IT PMO from the ground up, hiring and managing 20+ Project and Program Managers responsible for ~100 initiatives across North America, UK, EMEA, and APAC. Directed \$60M+ enterprise portfolio ensuring alignment with corporate strategy, financial objectives, and regulatory obligations.

- Oversaw \$60M enterprise portfolio, ensuring programs aligned with corporate strategy, financial objectives, and regulatory obligations across five global regions
- Partnered with COO and CFO to establish **risk-based investment and benefits measurement framework** that tied project funding to quantifiable maturity gains, enabling executives to **prioritize initiatives, allocate capital effectively**, and understand the **value realized from portfolio investments**; contributed to a **+0.76 CMMI improvement** in delivery performance and governance transparency.

- Introduced standardized metrics and reporting providing leadership clear visibility into progress, risks, dependencies, and financial performance across globally distributed programs
- Enabled cross-site collaboration aligning teams across infrastructure modernization, application security, and cloud migration while managing complex organizational change

IT Director, Global Corporate Systems | 2011 - 2014

Led team of 5 software developers and support engineers, stabilized corporate applications, standardized release processes, and improved BI platform adoption. Managed the enterprise Project & Portfolio Management (PPM) platform, Changepoint, enabling global project reporting, resource forecasting, and portfolio governance across all global business lines.

Earlier Experience | 2007 - 2011

Experian PLC — Sr. Manager, Head of IT PMO, North America | Allen, TX Led North America IT PMO managing team of 20 TPMs delivering 75+ global programs annually across infrastructure, security, and business systems. Established PMO governance standards, improved portfolio visibility, and drove consistency in planning, execution, and reporting across regional delivery teams.

Education & Certifications

University of California, Irvine — B.A. Social Sciences

Certifications: Project Management Professional (PMP) | Certified Scrum Master (CSM) | ITIL Foundation | AWS Certified Cloud Practitioner (CLF-C02)

Technical Proficiencies

Portfolio & PMO Tools: JIRA, Confluence, Asana, MS Project, Changepoint (PPM), Apptio, Smartsheet, portfolio management platforms • Reporting & Analytics: Tableau, QuickSight, PowerBI, Excel (advanced modeling), automated dashboards • Planning & Governance: OKRs, KPIs, capacity planning models, resource allocation frameworks, governance design, benefits realization tracking • Methodologies: Agile, Scrum, SAFe, PMBOK, ITIL, portfolio management frameworks • Cloud & Technical: AWS platforms, distributed systems, technology program delivery