SARAH MERRITT, CFA, PMP

SENIOR MANAGER, STRATEGY & ANALYTICS

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SUMMARY

People-first leader of teams with a demonstrated track record of transforming organizations through the application of emerging technologies and intentional change management. Strategic advisor to senior leaders facing unprecedented conditions. AI ethics evangelist.

WORK EXPERIENCE

Deloitte Consulting, LLP   March 2015 - Present

Senior Manager (2021 – Present); Manager (2018 – 2021); Senior Consultant (2015 -2018)

INTERNAL LEADERSHIP EXPERIENCE

- Co-Founder and Chief Operating Officer of Deloitte's US Government & Public Services (GPS) AI & Automation Market Offering, responsible for introducing RPA to the Federal government market; designed, implemented, led full spectrum of scaling efforts, grew business from an RPA investment center in 2016 to a $100M+ AI & Automation business of more than 200 practitioners in 2024
- Led strategic transformation and offering innovation in anticipation of market shift from RPA to AI; proactively positioned Deloitte as leaders in low-code AI & Automation for Government to maintain first-mover advantage through eminence building, strategic marketing, thought leadership, and intentional project selection
- Structured the agile, scalable transformation office responsible for all sales, delivery, and operational excellence activities through a period of hypergrowth; grew the office from a team of six at stand-up to a core team of 25 at maturity
- Partnered with regional and global leaders to define workstream charters, document objectives, develop business cases for investment, and align on leading sales, delivery, and operations practices
- Led the identification, definition, and execution of innovative projects, including developing success metrics and the methods to track them, staffing team, and justifying investment
- Engaged cross-functional, global stakeholders at all levels to develop an innovative strategic roadmap and go-to-market strategies that raised the profile of eminent Deloitte luminaries and our most supportive customers while maximizing market opportunities and maintaining cross-organizational integration
- Co-founded Deloitte's US Robotics Operations Center (ROC) in Orlando to consolidate our technical expertise in AI & Automation technologies while developing a highly skilled talent pool in a low cost of living region to improve margins in project delivery; the ROC is now home to more than 350 practitioners
- Led development of Deloitte's GPS GenAI pricing strategy, including developing our GenAI Pricing Playbook used by all leaders across GPS, through extensive internal and external research, coordination with vendors, and leveraging Deloitte's own market sensing tools
- Developed strong followership through intentional mentorship and initiatives such as the Bot Breakfast Club, a community of practitioners interested in AI & Automation who meet monthly to learn from subject matter experts and from each other through shared project experiences, to hear product and market updates directly from senior leaders, to advise and coach each other, and form a bonded network within the larger company that has ultimately served as a source of recruitment for the AI & Automation practice
- Co-Led the Federal Robotics and Cognitive Consortium (FRCC), a group of 200+ current and prospective clients, all federal government executives, who convened once per month – now quarterly – to present their AI & Automation accomplishments, discuss challenges and roadblocks, and hear directly from vendors

- Leading integration of Deloitte's GPS Microsoft Power Platform Tech Services Practice into the AI & Automation practice, with responsibility to establish sales and delivery operational capabilities to capture a $350M+ pipeline
- Requested by Deloitte's Argentinian and Australian firms to advise on the standup of their AI & Automation practices, including leading initial client conversations
- Initiated and matured relationships with innovative start-up software vendors through thoughtful relationship development with these key stakeholders; collaborated to shape market-facing messaging, to influence product roadmaps, and to co-create new solutions to create mutually beneficial market growth

CLIENT PROJECT LEADERSHIP | SELECTED EXPERIENCES

- **Federal Security Agency**
  - Leading the implementation of a first-of-its-kind GenAI solution to provide rapid access to guidance in a complex regulatory and policy environment
  - Leading elevation to the staging environment and alignment with client business, IT, and security stakeholders on deployment requirements for this leading-edge solution
  - Leading multiple client stakeholders across business, IT, security, and policy with varying degrees of tech savvy to align on a common long-term strategic vision for the business and the mission
- **Federal Law Enforcement Agency**
  - Led development and implementation of an automation and data visualization solution to allow the client team to quickly evaluate the availability of Schedule I and II Controlled Substances and List I Chemicals in the US pharmaceutical supply chain to enable rapid response to data requests from Congress and the White House
  - Convened a team of data scientists, data visualization experts, and automation experts to partner closely with client analyst and IT teams to gain deep understanding of the current state process, the long-term goal, and the anticipated challenges or roadblocks, ultimately leading to a solution that exceeds business requirements
  - Led design of innovative solution that - for the first time – brings together data from six disparate systems through automated data transformations and calculations, reducing time spent on manual processing
- **Mid-Size Federal Financial Agency:**
  - Advised client on complex ($4B+) outsourcing of their entire IT organization to multiple managed service providers, including designing a strategy to reallocate the remaining workforce
  - Collaborated across vendors and technologies to bring together subject matter experts on CRM and contact center best practices to maintain consistently high customer service levels throughout the transition; identified opportunities to consolidate five data platforms to three to reduce long-term cost of ownership and mitigate operational and privacy risks
- **Large Federal Financial Agency:**
  - Led client business division through the implementation of a first-of-its-kind intelligent automation solution leading to 11x ROI for the client and turning a $100K pilot project into a $15M portfolio of projects across multiple technologies
  - Led Intelligent Automation workstream for client's research and development group, collaborating closely with AI/ML experimentation leaders from across the organization to co-develop innovative solutions leveraging predictive analytics and automation, leading to improvements in case selection, resource allocation, and taxpayer service levels
- **Large Federal Procurement Office:**
  - Designed and implemented the first digital contracting officer in the Federal Government, fundamentally changing the business of government and establishing Deloitte as the client's trusted advisor for innovative solutions and emerging technologies, led to 16x increase in contract size
  - Developed scalable long-term governance and sustainment model, including designing a working capital fund, to enable enterprise-wide adoption of AI & Automation technologies through a federated model; led efforts

to increase adoption through outreach and education to promote culture change, including "shark tank"-style competitions, messages from leadership and from influential evangelists, and more

- **Large Quasi-Governmental Logistics Agency:**
  - Collaborated closely with UiPath to implement their first automation solution in the federal government leading to 63% faster processing time and improved visibility into supply chain
  - Established AI & Automation Center of Excellence (CoE) for client organization to enable sustainment and scale following initial success and expand influence enterprise-wide
  - Led team to meet challenging client deadlines requiring shift work and long hours; ultimately nominated by team members for leadership award

Evercore Trust Company, N.A. (now part of Newport Group)   August 2012 – March 2015
Assistant Vice President, Financial Analyst

- Advised Boards of Trustees and Named Executive Officers on their fiduciary duty to the beneficiaries of their pension plans
- Performed comprehensive sell-side equity research as a special purpose fiduciary on behalf of company employees and plan beneficiaries
- Completed special projects on behalf of clients, including valuation of illiquid assets, preparing for Department of Labor Transaction Exemption applications, and more

Boutique Non-Profit Consulting Firm   January 2012 – July 2012
Associate, Growth Strategy

- Led strategic planning process for a large international client; designed and conducted a comprehensive survey to define strategic priorities, analyzed 2,000+ responses

Lazard Asset Management   August 2011 – November 2011
Project Analyst, Graduate Intern

- Designed and executed a comprehensive competitive analysis of the primary mutual fund product (LCAIX) within the Morningstar World Allocation universe of 50+ funds

Evaluation Associates (now Mercer Investment Consulting)   October 2009 – August 2010
Research Associate

- Evaluated manager and portfolio performance including leading manager interviews, drafted research reports for client Investment Committees
- Implemented software solution to automate proposal writing

EDUCATION

Master of Business Administration | *magna cum laude* | IAE Paris, Sorbonne Business School   2011

Bachelor of Arts | Political Science, Spanish | Davidson College   2009

CERTIFICATIONS

Project Management Professional (PMP) | Project Management Institute (PMI)   2018

Chartered Financial Analyst® | CFA Institute   2017