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Top Skills

User Experience
Adobe Creative Suite
Information Architecture

Certifications

Learning Data Visualization
Building AI Powered Chatbots
Without Programming
Voice User Interface
Watson Assistant Foundations
The Voice Course

Publications

Close the Wealth Gap: Engage
Women Investors

Yelena Dobric, MS

Director of Gen AI UX • FinTech • Enterprise, B2B, SaaS • Designing
end-to-end experiences • Expertise creating 0-1 AI products •
Previously JPMorgan, Goldman, Prudential, BNY Mellon, Publicis
Sapient, CVS • Pratt alumna
New York, New York, United States

Summary

Hands-on product designer and player-coach with 8 years
experience in AI and 2+ years in Gen AI. My expertise is creating
and scaling AI-powered products. I drive measurable business
impact and simplify complexity.

Recent focus:

- Leading design for GenAI and LLM-powered experiences
- Delivering 0→1 products, agentic workflows, and AI-driven
automations that save resources and boost efficiency
- Embedding responsible AI, explainability, and robust security into
financial and healthcare platforms

Thrive in both advanced IC and leadership roles-whether designing,
shipping, or iterating on complex AI products. Excel at collaborating
with cross-functional partners (engineering, product, business). I
drive strategic vision, and translate ambiguity into clear, actionable
design.

Core strengths:

- GenAI/AI product design & strategy, user research, accessibility
- Fintech & B2B SaaS UX for traders, quants, portfolio managers and
financial advisors; but also for operations and Compliance.
- Responsible AI, LLMs, conversational interfaces
- Cross-functional leadership, agile teams

Strategic thought leadership and influence at the organizational and industry level (see "Featured" section):

- My Gen AI work has been featured in Harvard Business Review, in March 2025.
- My Gen AI solutions were showcased at the Microsoft Inspire conference in May 2023.
- While at Publicis Sapient, I authored a thought leadership article on women and investing, which the company published on March 8, International Women's Day, in 2021.

Played basketball for 10 years. Denver Nuggets fan.

Experience

Moody's Analytics

Director Of UX - Enterprise Generative AI

June 2022 - Present (3 years 3 months)

New York, New York, United States

Design Moody's Copilot; an ecosystem of about 15 skills in Slack, Teams and on a web platform. Skills are: data analysis and interpretation, content generation, summarization, interactive querying, personalized assistance and integration with Moody's services. Copilot improves efficiency and effectiveness of Moody's 14,000 employees.

My involvement consists of design for the platform, platform-wide features, and key products, such as "Chat With Your Data", "Build Your Own Assistant" and "Orchestrator" (agentic workflow). I also work on other Copilot skills, such as a skill akin to Code Interpreter by Open AI. When and where it is needed, I provide product management support and content strategy, to help navigate ambiguity, define requirements and move the team forward.

CVS Health

1 year

Senior Manager of Architecture

December 2021 - June 2022 (7 months)

Conversational AI Designer

July 2021 - December 2021 (6 months)

Remote

Training & Tuning an Intelligent Assistant in a call center for Aetna insurance members. The Assistant helped members find providers (doctors or facilities). I worked in post-production, as an AI Modeler / Tuner. I was assigned issues, and I performed research to determine the root of the problem. My research included studying mappings in a leading NLP engine, studying Analytics reports, and reviewing transcripts and audio. Then implementing improvements in the engine. Used Python, SQL and GitHub.

Publicis Sapient

Experience Lead - AI, Financial Services & Healthcare

March 2018 - July 2021 (3 years 5 months)

Manhattan

My focus was machine learning, artificial intelligence, and NLP (natural language processing) based products in institutional finance.

- Top 5th asset management company in the US: I designed end-to-end UX for a platform that hosted investment research models (about 10 models in MVP). The portal was versatile in a sense that it served 4 inherently different use cases: discovery, building, usage, and maintenance, of machine learning models.

I also designed 2 of the 10 models on it: Sentiment Analyzer and Language Analyzer.

- Goldman Sachs: Redesigned an asset transfer application for a private wealth management arm.

- Top 10 US biotechnology company: I reported into the Financial Services division. However, during COVID, we were a bit short handed so in an instance, I supported our Healthcare vertical. I developed UX Strategy for Conversational AI. The goal was to help the co-pay assistance division reduce abandonment rate of 20%.

BNY Mellon

AI UX Consultant

June 2017 - March 2018 (10 months)

Jersey City

Partnered with IBM Watson to apply their AI solution to Pershing clients' data, and surface results in a dashboard of NetX360, Pershing's platform

for financial advisors. Translated machine into human language. Partnered with Pershing Product team. Recommended where IBM should explain AI, or customize APIs, to make data meaningful to users. Also designed interaction and data visualization for the dashboard.

FIA Tech

UX Lead

July 2016 - June 2017 (1 year)

Manhattan

Established UX practice in this fintech startup, and provided full-stack UX service for a year. Incorporated UX into an existing Agile, developer-dominated environment, with biweekly sprints. Demonstrated value of industry-leading UX, in product placement and adoption. Advocated for users and best usability practices. Reported into the Product team.

- Designed a brokerage settlement web app from scratch, in 5 months. Completed both interaction and visual design.
- Redesigned a legacy web app in 3 months; 1st month = user research, 2nd = UX strategy, 3rd = complete app interaction
- Interviewed users and analyzed/synthesized feedback
- Ran whiteboarding sessions, built user flows, site maps and feature matrixes
- Partnered with front-end developers to create reusable assets and user stories for the QA team

J.P. Morgan

UX Designer

August 2012 - July 2016 (4 years)

Manhattan

Hired mid-2012 among first 6 UX designers, to Investment Banking division, to help launch J.P. Morgan Markets, single dealer platform that unified 50+ applications under one roof and provided single sign on to clients.

Worked intimately with product, business and development teams on redesign and enhancements of legacy systems and later innovation of new products and applications. Collected and audited many different user interfaces and, with a growing team of UX professionals over the next 4 years, built a world-class set of interaction and visual design standards.

Eventually, saw the platform grow to a mature high-end product, with 140,000 users. The UX team grew to 26, and morphed into the largest UX group at

JPMC. The Product team also grew to about 25. Together, we were a true Center of Excellence. In addition to team efforts, during the 4 years, I built UX/UI for 10 applications, and a variety of features, such as:

- Chat app
- Query management app for Operations personnel: a consolidated view of tasks and queries, allowing cross prioritization, contextualization and metrics from a common interface; thus replacing manual processes, reducing security risk and contributing to significant savings from a tech perspective
- Redesigned web navigation to enable nav by asset class, surface relevant content, encourage trade lifecycle, and align to contemporary UX trends and patterns

Prudential Financial

UX/UI designer

May 2010 - July 2012 (2 years 3 months)

Woodbridge, NJ

- Interviewed Millennials, as part of "Millennials & Saving" effort; a research team that hosted events at universities and public venues. We spoke with our younger customer base, to understand not only their savings behavior, but how they prefer to do business, socialize, and interact.
- Designed user interface for the website and mobile email campaign, for the first and the largest Pension Risk Transfer deal ever undertaken in the U.S.
- Designed integrated campaigns for Participants, Plan Sponsors, and Intermediaries. Trained new hires and freelance staff, in how to design for those 3 different audiences
- Designed, coded and distributed HTML emails, using Epsilon's DREAMmail distribution platform
- Designed email part of an integrated campaign that earned \$18 million in two weeks, in new enrollment, rollover and increased contribution

S&P Global

Senior Designer

November 2007 - January 2009 (1 year 3 months)

Manhattan

Served in a web designer role, creating interactive banner ads, HTML emails and wireframes and visual design for websites. Reported into Corporate Creative Services team.

Education

Pratt Institute

Master of Science (M.S.), Communication Design

Manhattanville University

Bachelor of Fine Arts (BFA)