

Sam Arias

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EDUCATION

UC BERKELEY

HAAS SCHOOL OF BUSINESS

May 2022

Cumulative GPA: 3.8

B.S., BUSINESS ADMINISTRATION

SKILLS

TOOLS & APPLICATIONS

SQL • Postgres/Metabase •
Salesforce • Notion • Google
Workspace • AWS • GCP • Figma •
Illustrator • Photoshop

CAPABILITIES

Systems Design • Process
Architecture • Data Normalization •
Activation Frameworks •
Cross-Functional Execution • Change
Management • Digital Transformation
• Project Delivery & Management

LANGUAGES

Spanish (Native) • Italian (Limited)

SELECTED PROJECTS

POLITICS PODCAST

Co-created an educational political debate podcast with 1,000 listeners to date called *Disagree to Agree*.

EV REDESIGN (DES INV 190)

Led a team of 4 people to prototype an electric skateboard.

AWARDS

GENERATIVE AI ESSENTIALS

AWS Partner Network

Awarded to practitioners with foundational knowledge of AWS Generative AI capabilities

ICAGILE CERTIFICATION

ICAgile

CAL LEADERSHIP AWARD

California Alumni Association

Awarded to 7% of 9,000+ applicants; Merit-based scholarship that recognizes innovative, motivational leadership

EXPERIENCE

ALLOCATE | ACCOUNT MANAGER & IMPLEMENTATION SPECIALIST

July 2025 – Present | New York, NY

- Owned full onboarding lifecycle for UHNW and RIA clients, orchestrating cross-functional Product, Engineering, Ops, and GP/admin resources to deliver clean, accurate private-markets portfolios within tight activation windows.
- Designed scalable activation frameworks by identifying patterns across implementations and building repeatable playbooks for permissions setup, GP outreach, data ingestion, and reconciliation.
- Drove organizational adoption by delivering structured rollout plans, admin training, and expectation-setting that accelerated client time-to-value and built internal champions.
- Provided technical guidance across Allocate's data models, automation stack, and reporting engine; translating complex concepts into clear business value for stakeholders from analysts to CIOs.
- Managed structured 30/60/90-day project plans, milestones, and risk mitigation across multiple concurrent client activations; ensured each onboarding met success criteria and achieved production readiness.
- Built and maintained operational systems (Notion, Salesforce, SQL/Metabase) for onboarding workflow orchestration, relational data structures, mass outreach, and auditable reporting.
- Led data ingestion and normalization workflows across 100+ private-market funds, enforcing schema rules and reconciling NAV/TVPI/capital data to ensure platform accuracy.
- Served as voice of the customer, channeling insights to Product and Engineering to influence roadmap decisions around access control, automation reliability, and onboarding tooling.

DELOITTE & TOUCHE LLP. | CONSULTANT

June 2021 – July 2025 | New York City, NY

- Cross-industry consulting across Infrastructure, Hyperscalers, AI, Telecom, Media, Compliance, Finance, and Data Management.

Internal Alliances & Partnerships

- PM for 4 international alliances with major hyperscalers; expanded Deloitte's ecosystem presence and standardized global reporting.
- Delivered weekly insights to Global Partners and built scalable processes enabling a \$1B+ hyperscaler pipeline across 5 continents.
- Built repeatable engagement playbooks that standardized stakeholder onboarding, triage paths, and reporting structures across complex, multi-team environments.

Multinational Entertainment Conglomerate

- Led stakeholder interviews and designed a communication "Gap Analysis" toolkit to identify cross-subsidiary breakdowns.
- Presented findings and built prioritization tools (e.g., Heat Map) to guide remediation workflows.

Multinational Payment Card Services Provider

- PM across 3 compliance workflows; unified reporting, clarified roles, and established operating cadence for 45+ team members.
- Streamlined executive-management communication by translating workflow friction into actionable remediation plans.