

Luka Berg

📞 (919) 555-0148 ✉️ luka.berg@example.com

🌐 linkedin.com/example/lukaberg 📍 Raleigh, NC 27609



SUMMARY

Enterprise data and AI executive with 18 years of **progressive leadership** across insurance, **financial services**, **healthcare**, and **regulated technology** environments. Builds federated operating models that pair accountable domain ownership with shared platforms, enterprise standards, practical governance, and responsible AI guardrails. Leads data governance, engineering, analytics enablement, privacy, architecture alignment, and AI oversight across 34 business domains, supporting thousands of internal users. Trusted advisor for executive committees, Enterprise Architecture, Cybersecurity, Audit, Compliance, and business presidents, translating complex data and AI tradeoffs into investment priorities and measurable value. Established stewardship councils, quality controls, lineage practices, platform road maps, and enablement programs that improve consistency without centralizing delivery. Ready to help Piedmont Mutual Holdings advance trusted data assets, shared platforms, compliant AI adoption, and enterprise-wide business outcomes.

EXPERIENCE

Chief Data Officer

June 2021 - Present

Blue Ridge Financial Services

Charlotte, NC

Leads enterprise data and AI strategy for a regulated financial services organization spanning 34 business domains. Directs governance, platform engineering, analytics enablement, privacy, and responsible AI across centralized and embedded teams, connecting investment choices with readiness, risk, adoption, and operating value.

- Set federated data and AI strategy across 34 domains, linking priorities with readiness, risk, and **business value**.
- Established **Data Domain Councils** assigning ownership for definitions, quality, classification, lineage, and lifecycle decisions.
- Directed a 78-person organization across governance, engineering, analytics, privacy, and **responsible AI** functions.
- Sponsored reusable cloud **data platforms** with governed ingestion, **integration patterns**, semantic assets, and access controls.
- Created AI review framework covering **model risk**, privacy, security, oversight, documentation, and monitoring for business pilots.
- Presented investment cases, risks, tradeoffs, and adoption measures to executives, architecture, cybersecurity, audit, and compliance leaders.

Senior Vice President, Enterprise Data

March 2017 - May 2021

HarborPoint Insurance Group

Atlanta, GA

Owned **enterprise data** governance and analytics platform road maps for a multi-state insurer serving property, casualty, life, and employee benefits operations. Unified policy, stewardship, quality, architecture, security, and enablement practices while preserving domain accountability across business units.

- Consolidated fragmented governance into federated standards, stewardship charters, issue escalation, glossaries, and quality scorecards.
- Modernized **warehouse**, lake, API, and **reporting** infrastructure with architecture reviews and embedded security controls.
- Formed underwriting and claims councils that prioritized authoritative assets for pricing, reserving, reporting, and service.
- Strengthened classification, retention, access reviews, lineage evidence, and third-party oversight with compliance and **cybersecurity**.
- Built onboarding playbooks, office hours, and dashboards that increased governed data-product adoption across business units.
- Aligned **platform road maps** with regulatory reporting, **analytics enablement**, and operating priorities for multi-state insurance teams.

Vice President, Data Platforms and Governance

July 2013 - February 2017

Northstar Analytics Cooperative

Nashville, TN

Directed **data engineering**, architecture, governance, and analytics enablement for a cooperative serving regional banks and insurance administrators. Built shared platform foundations and stewardship agreements that supported federated member environments, reliable integrations, and regulatory reporting priorities.

- Delivered **shared platforms** using cloud storage, relational services, ETL orchestration, metadata, and **role-based access** patterns.
- Introduced stewardship agreements clarifying accountability for customer, policy, transaction, provider, and financial reference data.
- Standardized batch, event, and API **integration patterns** for repeatable onboarding of new data sources.
- Established quality monitoring for completeness, validity, timeliness, and **reconciliation** with actionable owner issue queues.
- Advised member executives on platform tradeoffs and phased road maps tied to reporting and service objectives.
- Coordinated engineering, architecture, governance, and **analytics** teams across federated member environments and shared delivery models.

Director, Enterprise Information Management

August 2010 - June 2013

Meridian Health Benefits

Louisville, KY

Managed enterprise information management for a health benefits administrator, covering **data architecture**, reporting controls, metadata, integration governance, and analyst **enablement**. Connected claims, enrollment, provider, finance, compliance, and security stakeholders through practical councils and accountable issue management.

- Created cross-functional governance council spanning claims, enrollment, providers, finance, **compliance**, and information **security**.
- Defined business terms and ownership assignments for member, provider, eligibility, and claims reporting.
- Guided warehouse and **integration** projects through architecture reviews, mapping, access assessment, testing, and readiness checkpoints.
- Connected data exceptions with accountable stewards, root-cause analysis, remediation decisions, and documented follow-up.
- Developed analyst training and reference materials supporting certified reports and consistent measure interpretation.
- Strengthened reporting controls through metadata practices, integration governance, and production readiness reviews.

Data Architecture Manager
CivicBridge Technology Partners

July 2008 - July 2010
Indianapolis, IN

Led **data architecture** engagements for **insurance** and healthcare clients, translating business processes into governed models, integration designs, and analytics-ready structures. Facilitated decisions across business, application, development, security, and compliance stakeholders while mentoring four associate architects and analysts.

- Designed conceptual and logical models for policy, member, claims, provider, and billing domains.
- Evaluated warehouse, data mart, and integration options against security, scalability, interoperability, reporting, and regulatory needs.
- Built architecture review templates covering lineage, classification, interface contracts, **retention**, access, and support ownership.
- Facilitated workshops resolving conflicting requirements before implementation across business and **technology** stakeholders.
- Mentored four associate architects and analysts through modeling standards, design reviews, communication, and documentation.
- Translated client processes into governed structures supporting **analytics**, reporting, integration, and operational decision-making.

PROJECTS

Federated Data Product Marketplace 📅 2024

Created a reusable platform model for governed data products across finance, claims, underwriting, and service domains. Domain owners retained accountability while shared standards improved discovery, trust, interoperability, and adoption.

Responsible AI Governance Framework 📅 2022

Established intake, model risk, privacy, security, human oversight, documentation, and monitoring practices for business-led AI pilots in a regulated environment.

Insurance Data Stewardship Council 📅 2020

Built council operating practices for underwriting and claims leaders, resolving competing definitions and prioritizing authoritative assets for pricing, reserving, reporting, and customer service.

LEADERSHIP & AWARDS

- Executive Leadership Award, Blue Ridge Financial Services, 2024
- Enterprise Stewardship Excellence Award, HarborPoint Insurance Group, 2020
- Data Governance Leadership Recognition, Meridian Health Benefits, 2012

EDUCATION

Master of Science in Information Systems
Indiana University Bloomington GPA: 0
Coursework: Data architecture, enterprise systems, information governance, analytics management

2008
Bloomington, IN

Bachelor of Science in Management Information Systems
University of Wisconsin–Madison GPA: 0
Coursework: Database systems, systems analysis, business intelligence, technology management

2006
Madison, WI

CERTIFICATIONS

- Certified Data Management Professional (CDMP) 📅 2016
- Certified Information Privacy Professional/United States (CIPP/US) 📅 2019
- AWS Certified Solutions Architect – Associate 📅 2021

TECHNICAL SKILLS

- **Data Governance:** Data policies, stewardship charters, governance councils

- **Data Architecture:** Conceptual models, logical models, enterprise architecture
- **Data Platforms:** Cloud storage, relational services, semantic assets
- **Data Integration:** ETL, batch integration, event integration
- **API Technologies:** REST APIs, interface contracts, API patterns
- **Analytics Platforms:** Data warehouses, data lakes, reporting platforms
- **Metadata Management:** Business glossaries, metadata assets, data lineage
- **Data Quality:** Completeness, validity, timeliness, reconciliation
- **Security and Privacy:** Access controls, data classification, privacy reviews
- **AI Governance:** Model risk, human oversight, AI monitoring
- **Compliance and Audit:** Regulatory reporting, retention, audit evidence
- **Operating Models:** Federated teams, domain ownership, shared delivery

SKILLS

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|------------------------------|------------------------|------------------------|-----------------------------|
| • Federated Data Strategy | • Data Architecture | • Data Quality | • Responsible AI Governance |
| • Enterprise Data Governance | • Data Engineering | • Metadata and Lineage | • Model Risk |
| • Data Stewardship | • Cloud Data Platforms | • Data Classification | • Integration Patterns |
| • Data Domain Councils | • Analytics Enablement | • Privacy | |

PROFESSIONAL AFFILIATIONS

- Board Advisor, Carolinas Data Leadership Forum, 2023 - Present
- Member, Financial Services Information Sharing and Analysis Center, 2018 - Present
- Volunteer Mentor, Data Management Association professional mentoring program, 2015 - Present

LANGUAGES

- English (Native)
- German (Intermediate)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST