

JAKE MAGRI

AI Solutions Consultant

Workflow Automation • Product & Systems Design • Charlotte, NC

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Experience

ImagineSoftware

Mar 2025 – May 2026

AI Specialist — Revenue Cycle Management (RCM) Product Solutions & AI Adoption

Charlotte, NC

- Partnered with executive leadership, operations stakeholders, and engineering teams to translate healthcare revenue cycle workflow challenges into AI-enabled automation, reporting, operational, and product initiatives for a multi-eight-figure ARR medical billing SaaS platform.
- Designed and demonstrated OCR and document-intelligence workflows for radiology billing operations, transforming unstructured medical documentation into patient demographic and charge-data extraction pipelines supporting enterprise client workflows and contributing to a \$60k enterprise solution sale.
- Designed and implemented AI workflow systems integrating OpenAI APIs, OCR pipelines, vector retrieval, AWS Lambda, and legacy healthcare infrastructure to streamline document processing, operational reporting, knowledge access, and AI-assisted workflows.
- Built retrieval-augmented AI support systems that transformed 25+ years of technical documentation into citation-grounded conversational experiences supporting operations, client support, implementation, and product teams.
- Mapped business terminology, operational logic, and reporting requirements to legacy healthcare data structures, enabling natural-language reporting and retrieval workflows over 20+ years of RCM transactional data within HIPAA/SOC2-aligned environments.
- Translated business requirements into AI-enabled workflows and partnered across technical and operational teams to deliver conversational AI, document intelligence, and reporting automation initiatives.

Brooksource @ Ally Financial

Feb 2024 – Sep 2024

Technical Release Coordinator — Cross-Functional Delivery

Charlotte, NC

- Coordinated mission-critical software releases across 15+ engineering teams, acting as liaison between technical leads, scrum masters, release management, and business stakeholders while maintaining 98% on-time delivery.
- Improved release visibility through Jira, ServiceNow, and Confluence reporting, dependency tracking, release governance, and stakeholder communication.
- Supported enterprise sprint releases across GitLab, AWS, Jira, and Confluence while coordinating release readiness, dependencies, operational risks, and delivery communication.

Domtar

May 2023 – Aug 2023

Test Automation Engineer Intern — ERP Quality & Process Validation

Charlotte, NC

- Supported ERP validation workflows using Tricentis TOSCA, SQL Server, and automated testing processes, reducing testing cycle time by 30%.
- Identified, documented, and communicated SAP ERP defects and operational risks to engineering stakeholders.

Army National Guard

Mar 2019 – Feb 2021

Combat Medic

Charlotte, NC

- Managed medical documentation, operational coordination, and team communication in high-pressure environments, strengthening leadership and healthcare workflow awareness.

Education

University of North Carolina at Charlotte

Dec 2023

B.S.B.A. in Management Information Systems — GPA: 3.92

Charlotte, NC

University of North Carolina at Charlotte

Dec 2024

Full Stack Developer Certification

Charlotte, NC

Core Skills

- **Applied AI Systems:** OCR, Document Intelligence, Retrieval-Augmented Generation (RAG), Vector Retrieval, NL-to-SQL, Conversational AI, LLM Workflows, AI Evaluation, Workflow Orchestration, AWS Lambda, API Integrations
- **Business & Product Systems:** Requirements Gathering, Workflow Discovery, Solution Design, Stakeholder Communication, User Stories, Acceptance Criteria, UAT, Business Process Mapping
- **Healthcare SaaS & Delivery:** Revenue Cycle Management, Medical Billing, HIPAA/SOC2, Jira, Confluence, Agile/Scrum, ServiceNow, SQL, SSAS, Git/GitHub, Python, C#, TypeScript