

Katie Carr

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Portfolio & case studies at katiencarr.ai (opportunities section password: KcarrAI)

Built an enterprise AI function from scratch at a 750+ person global investment bank. Designed the enablement program (engagement strategy, customized trainings, internal training content, activation playbooks), managed Anthropic and Databricks partnerships, and presented governance frameworks to the Board. Prior career is a decade of operating as the cross-functional integration point in high-stakes environments—US Senate, Melinda Gates' office, financial services teams. Looking to bring that playbook—and the practitioner conviction behind it—to organizations ready to get AI adoption right.

EXPERIENCE

Perella Weinberg Partners

New York, NY

2023 – Present

Executive Director & Head of Innovation

- Stood up the firm's entire AI function: no team, no budget, no precedent. Now used voluntarily across 750+ professionals in IB, Product Groups, and Operations across 11 global offices—achieving 83% active user rate with 40% becoming power users. Self-funded the entire AI technology stack through \$710K+ in savings from legacy tool consolidation, vendor contract restructuring, and elimination of external consulting. Separately delivered ~\$1.5M in broader operational cost savings prior to the AI initiative.
- Built the enablement stack from scratch: 40+ skill AI library, tiered adoption scoring system, firm-wide onboarding program, and the “Five Pillars” methodology for continued updates in line with our providers—a documented, repeatable playbook for enterprise AI activation.
- Managed the Anthropic and Databricks partnerships end-to-end: deployment strategy, technical enablement, product feedback loops. Not vendor management—actual co-development.
- Operated as the single integration point across IB, Legal, Compliance, and Ops. Translated each group's workflows into AI use cases, resolved competing priorities, eliminated duplication.
- Developed AI governance frameworks and presented to the Board of Directors. Built the risk and compliance infrastructure the firm needed before it could scale adoption.
- Shipped production tools: Deal reconciliation dashboards, supply chain analytics dashboards, custom MCP integrations.
- Built a champion network of early adopters equipped as peer evangelists—with talking points, use cases, and direct access to me. Grew power users (10+ weekly interactions) by 60%+ across most business units. This internal model is the prototype for partner-led activation at scale.

Summit Trail Advisors

New York, NY

2021 – 2023

Chief Operating Officer, NYC Advisory Team

- Ran operations for the firm's highest-revenue NYC advisory team. Owned the full stack: client activation and strategy, operational infrastructure, vendor and partner coordination.
- Scaled Firm's first centralized product group, Estate Planning. Worked with existing team to map out process, improve efficiency, developed pricing model, engagement strategy and communication to internal teams, as well as clients.

Geller & Company

New York, NY

2019 – 2021

Business Operations & Strategy Manager / Chief of Staff

- Project managed the Human Capital workstream for the Bloomberg LP acquisition from discovery to execution: coordinated information flow across deal teams, ran cross-party meetings, partnered with department heads on scenario planning, and collaborated on recommended terms.
- Produced Board materials and management presentations for strategic engagements.
- Led cross-functional initiatives across Risk, D&I, COVID Response, Talent Acquisition, and organizational re-entry—working with senior stakeholders across every functional area.
- Ran people analytics to measure effectiveness and inform HR strategy for firm leadership.

Gilder Gagnon Howe & Co

New York, NY

2018 – 2019

Chief Executive Assistant to Managing Partner

- Right hand to the Managing Partner: client strategy, daily briefings, board prep. Built organizational systems adopted by the wider team and firm.

Pivotal Ventures

Seattle, WA

2017 – 2018

Executive Business Partner to Melinda French Gates

- Conduit to the Principal across external stakeholders and partner organizations. Managed multi-stakeholder coordination, sensitive communications, and executive systems across a high-volume operation.

United States Senate

Director of Scheduling & Operations, Senator Dean Heller

Washington, D.C.

2013 – 2017

- Managed 4 direct reports across 4 offices. Owned a multi-million dollar budget (operational, technology, software). Ran payroll, benefits, and compliance for all staff.
 - Coordinated the Senator's participation across 5 Senate Committees (Finance; Banking; Commerce, Science & Transportation; Veterans; Aging). Fielded requests from Members of Congress, the President, VP, Cabinet heads, and foreign dignitaries.
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EDUCATION

University of Nevada, Reno — B.A. Political Science, 2013

Millennium Scholarship · Research presented at Western Political Science Association