

MARC MORGAN

AI Product Operator • Founder • Systems Builder

California | Open to San Francisco/Bay Area hybrid and U.S. remote

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PROFILE

Founder/operator and AI product builder who turns ambiguous business problems into shipped, auditable systems. Built and operated a multi-brand publishing business with 285 books published on Amazon, then built PubPod, Polymath OS, and the AI-assisted operating layer behind it: AI-assisted production, human-in-the-loop QA, multi-brand publishing, customer commerce, finance/data workflows, and growth automation. Brings 12 years across two Wall Street brokerages in wealth management, private-market placements, and client acquisition, plus product and UI judgment, full-stack execution, and program leadership.

CORE CAPABILITIES

AI product and workflow design • Agentic pipelines, evaluations, and human review • Product/program operations • Client acquisition and webinar systems • Release gates, visual QA, and auditability • React/TypeScript/Next.js/Vite/Node/Python/Streamlit • Postgres/SQLite • APIs and integrations • Stripe/Gelato/Etsy/Resend/Vercel/Railway • Finance, data, SEO, and growth

CREDENTIALS

Series 7 • Series 63 • Series 65 (earned, not active) • Two years of college coursework

EXPERIENCE

Founder & AI Product Operator | Polymath Publishing House + venture portfolio | San Francisco, CA | 2018 to Present

- Built and operated a multi-brand publishing business spanning children's workbooks, language learning, nonfiction, wellness/self-help, and branded products; 285 books published on Amazon.
- Designed a release-gated book production system from research and positioning through manuscript, illustration, layout, visual QA, answer-key validation, and publishing handoff.
- Built Polymath OS, a multi-brand operating system spanning social publishing, private ISBN Management, and Project Management with visible agent activity; also covers brands, packets, assets, approvals, schedules, publishing, and feedback.
- Implemented deterministic, human-in-the-loop quality systems: manifests, source hashes, fail-closed readiness gates, review packages, model-review workflows, convergence tracking, no-AI-slop checks, and full visual QA.
- Devised an ASCII-layout prompting method for image-generation models: prose specifies content but cannot specify spatial arrangement, so a standalone ASCII layout acts as the controlling composition reference. A retained A/B test showed the prose-only prompt produced a visually better page that leaked the answer a child was meant to deduce; the layout-guided version did not. Promoted into the shared prompt builder as a permanent rule.
- Built and launched PubPod (pubpod.co), a multi-tenant SaaS marketing platform for independent publishers with public pricing, self-serve onboarding, publisher terms, and compliance surfaces, connecting catalog records, lists and subscribers, campaigns and sequences, consent and suppression, landing pages, managed links, and delivery workflows.
- Hired, trained, and managed a distributed production team of 13 across the Philippines, Egypt, and Pakistan over three years, building the style guides, review passes, and quality standards that made remote book production reliable; later designed the agentic systems that absorbed most of that production work.
- Recently launched Med Spa Momentum, an early-stage AI-services venture built around GoHighLevel infrastructure for aesthetic practices, and authored/published the 173-page book *The AI-Powered Med Spa*.

Financial Advisor / Financial Consultant | Laidlaw Wealth Management LLC | New York, NY and San Francisco, CA | Nov 2014 to Feb 2025

- Promoted from Financial Consultant to Financial Advisor (Jan 2019); spent the final six years building and running the San Francisco practice. Series 7, 63, and 65 (earned, not active).
- Sourced and placed private-market investments with accredited retail clients on the investment-banking side of the firm, including pre-IPO SPVs, private placements, and private deals, covering diligence, suitability, subscription documentation, and investor education on illiquid, high-risk positions.
- Translated complex financial, risk, and investment topics into client decisions, recommendations, and execution under uncertainty.
- During the pandemic, built LinkedIn client-acquisition systems and end-to-end webinar funnels covering prospecting, education, qualification, and follow-up.

Registered Representative | Meyers Associates L.P. | New York, NY | 2012 to 2014

- Began a finance career at a New York broker-dealer, covering prospecting, client relationships, suitability, and trade execution.

Sponsorship Director | Golden Gate Triathlon Club | San Francisco Bay Area | Oct 2019 to Nov 2021

- Led sponsorship for a San Francisco endurance club as a board member, sourcing and managing partner relationships, agreements, and renewals.

SELECTED SYSTEMS AND PRODUCTS

PubPod (pubpod.co): Launched SaaS marketing platform for independent publishers, built around books, reader journeys, consent-safe campaigns, sender boundaries, idempotent delivery, and auditable workflow state. Public pricing, self-serve onboarding, publisher terms, privacy, and compliance surfaces.

StorytimeHero: Personalized AI storybook platform built with Next.js, React, Payload, Postgres, Gemini, Stripe, Gelato, and Etsy; moves from customer photo and story inputs through AI generation, human QA, and print fulfillment.

Workbook and high-content review OS: 109-page workbook blueprinting, deterministic artifact validation, separate answer-key verification, binary release gates, hash-aware review convergence, and reproducible handoff packages.

Tax Intel CA/Fed: Local-first tax document intelligence with source-linked review, historical filing maps, append-only evidence, read-only QuickBooks retrieval, and CPA-ready handoff design.

kdColor: Private end-to-end design and print production platform behind the Cozy Coloring Vibes imprint: a fabric.js template editor with undo/redo, smart-guide snapping, and data binding, plus automated line-art QA and KDP/IngramSpark print export. Roughly 447,000 lines across 1,400+ commits.

StripeFit (stripefit.com): Content operation publishing 1,679 running-gear guides through an automated pipeline with per-page affiliate disclosure, a published methodology, and an enforced editorial boundary separating purchase guidance from medical advice.

Med Spa Momentum: Early-stage AI-services venture and published book focused on lead capture, follow-up, no-show recovery, dormant-patient reactivation, referrals, and owner visibility for aesthetic practices.

ADDITIONAL

Five full-distance Ironman races, eight Ironman 70.3 races, four Olympic-distance races, and a Kona qualification. Traveled in 35+ countries.