

Professional Experience

Industry: Financial Services

Note: Samples of actual work furnished upon request in F2F interviews

▶ Project and Classification

- ▶ Transform and streamline a US retail and commercial financial institution
- ▶ Mission Critical

▶ Business Vision

- ▶ Streamline the retail branch system of a US bank in order to secure international business with an affiliated financial institution

▶ Scope: Budget and Time Line

- ▶ \$40M – 24 Months

▶ Governance

- ▶ Board of Directors, Chief and Executive level leadership, 3rd Party Consultants, Senior and mid-level management

▶ Core Competencies Leveraged and Methodology

- ▶ Waterfall and Agile
- ▶ Mergers & Acquisitions, Strategic Planning, Business Transformation

▶ Results

- ▶ Secured a \$40M engagement with an international financial institution
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