

[Full Name]

[City, State] ■ [Phone]
[Email] ■ [LinkedIn]

Data Transformation Execution Lead

**Driving Business Decision-Making ■ Defining the Vision of Data Programs ■ Modernizing Platform Architecture
Enhancing Data Quality to Fuel Business Value**

Tech and data leader who delivers high-performance, cost-effective, and innovative solutions to meet challenging business demands. Known for driving alignment within highly regulated industries while producing the optimal results.

Change catalyst who acquires client insights to guide the efforts of sales teams. Experienced at identifying high-value, low-risk clients by creating effective algorithms. Skilled at decommissioning legacy systems and enhancing data structures.

Relationship-builder and problem-solver who understands the importance of fostering trust with internal and external stakeholders. Career history of building and leading high-performing teams. Strong ability to collaborate across divisions.

~ Core Expertise ~

Cost Reduction | Process Improvement | Program & Project Management | Data Governance | Regulatory Compliance
Data Warehouses & Data Marts | Cloud Migration | Automation | AI-Driven Solutions | Data Visualizations | Systems Integration
Team Leadership | Talent Development | Vendor Management | Strategic Partnerships | Risk Assessment & Management

Leading Global Teams of 100+ Resources ■ Achieving Multimillion-Dollar Annual Savings

Cost Reduction

Led a program to improve the transparency of \$2B in annual expenses. Pursued an objective of saving \$100M YoY over three years, partnering with a vendor to achieve \$20M YoY savings.

Financial Regulatory Compliance

Spearheaded the delivery and go-live of Volcker Metrics. Partnered with Technology and Regulatory teams to submit risk, inventory, and client data to US agencies (FED, SEC, CFTC)

Effective Client Targeting

Enhanced global predictive analytics by creating a data-driven client interest/prioritization engine to surpass sales objectives. Empowered Sales teams with real-time client insights.

Professional Experience

[Global Investment Bank] – [City, State]

2009 to Present

Director, Post Trade (2022 to Present)

Own responsibility for two data programs; manage 90+ resources across the US, UK, and India.

Drive the execution plan for post-trade data transformation, including developing a vision and messaging to articulate the value of progressing toward a target state. Lead team meetings to create a consensus on expectations and responsibilities. Identify and remove roadblocks. Leverage experience in large-scale, multi-year planning.

Post Trade Data Transformation Program:

- ▶ Led a migration from on-premises to AWS by establishing plans for data quality and control. Improved the time-to-market and ease of access to post-trade data. Modernized outdated systems to improve the program's efficiency.
- ▶ Championed the simplification of data transformation, data flow, and data management. Aggregated post-trade processes to build data in a seamless, cohesive manner. Enabled real-time analysis and opened future build opportunities.

Cost Per Income Program:

- ▶ Oversaw \$2B in expenses per year and overcame challenges from a lack of transparency. Brought in a third-party vendor and provided scrubbed data. Identified cost savings opportunities and improved the enterprise's negotiating power.
- ▶ Drove \$20M in cost savings YoY by coordinating cross-functional divisions with the goal of saving \$100M in 3 years.

Professional Experience, [Global Investment Bank], Continued:

Director, Global Head of Client Data Analytics, Investment Banking Technology (2014 to Present)

Oversaw 100+ staff across six international locations and a portfolio valued at ~20M CHF.

Guided the delivery of improvements to enterprise-wide client data and analytics capabilities. Steered the data strategy ahead of a Salesforce rollout. Optimized the performance of the firm by enhancing client management, prioritization, and targeting. Identified and seized cost reduction opportunities without sacrificing the quality of data. Continuously improved efficiency.

Technology Integrations / Transformations:

- ▶ **Standardized reporting across the division** by migrating client MI across global markets for single view of hierarchies.
- ▶ **Implemented Client360 to provide a holistic view of data**, including revenue, contribution, capital, balance sheet/leverage, wallet share, pricing, and activities. Led the delivery of the mobile app to provide rapid access.
- ▶ **Spearheaded the delivery and go-live of Volcker Metrics** after partnering with Technology teams and Regulatory Services to consolidate and submit business-wide risk, P&L, client-facing data, and inventory metrics to US agencies.
- ▶ **Enhanced global predictive analytics capabilities** by partnering with internal and external teams to power client targeting; created a data-driven client interest/prioritization engine, driving business growth.

Significant Cost Savings:

- ▶ **Drove an \$8M/year (65%) reduction of the total application cost** by retiring 9 legacy systems and delivering strategic target state client MI (mobile intelligence) platforms.
- ▶ **Reduced \$200M of economic and human capital resources** allocated to unsegmented and lower-tiered clients.

Vice President, Global Delivery Lead Securities, Sales, Business Intelligence, & Reporting (2009 to 2013)

Managed a global development team of 40+ resources while building end-state architecture.

Owned responsibility for the end-to-end architecture of multiple sales applications. Demonstrated strong change management and leadership abilities while influencing technology across the enterprise. Engaged and connected with global stakeholders to design and execute strategic plans. Drove the alignment of business priorities and projects to deliver results.

- ▶ **Achieved 70% growth in usage YoY**; drove adoption of the Client Dashboard and the firm's sales analytics platform with 2000+ users.
- ▶ **Developed and launched a self-service reporting tool** to enable access to data across years; reduced costs \$1m/year.
- ▶ **Expanded the Microsoft SSAS OLAP framework** for sales reporting, replacing data marts and databases.
- ▶ **Slashed \$2.2M in annual technology infrastructure costs** by overhauling the Fixed Income Strategy and Client Revenue policy; improved functionality, stability, and internal controls while elevating the overall quality of data.

[International Investment Bank] – [City, State]

2008 to 2009

Assistant Vice President / Delivery Lead / Project Manager

Integrated data from two merging financial institutions by designing and delivering a day-1 sales reporting data mart. Aligned the data infrastructure, warehousing, and reporting with the bank's goals. Built a reputation for excellent project management abilities.

[Global Financial Services Firm] – [City, State]

2001 to 2008

Assistant Vice President / Project Lead – Client Central

Led a team of eight technical professionals to develop and implement an interactive client portal. Owned responsibility for strategic planning, governance, and data analytics. Designed the logical and physical model of the client analytics data warehouse, sourcing qualitative/quantitative metrics (revenue, risk, credit exposure, AUM, balances, budgets, wallets).

Education & Professional Development

Masters Degree in Computer Science ■ Stevens Institute of Technology – Hoboken, NJ
Certified Cost and Management Accountant ■ ICAI (Institute of Cost Accountants of India)