

SHAHROOZ R. BHOPTI

AI LLM Agentic Engineer, Chief Strategic Indicator & Coaching Lead

Charlotte, NC or Any Metro Worldwide

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“There are no failures, only outcomes” | <https://cv.rooz.live/credly>

“For small creatures such as we the vastness is bearable only through love”;

“How wonderful that we have met with a paradox. Now we have some hope of making progress.”

Orion’s “Integrity” embodies foundational values of trust, respect, candor, humility, and a mission success integrated effort.

[GoodReads.com/DrivenCompassion](https://www.goodreads.com/book/show/12000000-Driven-Compassion) (accepting recommendations) | <https://cv.rooz.live>

PROFESSIONAL SKILLS

- MANAGEMENT:** Agile Coach; Application Lifecycle Management (ALM); Business Intelligence; Business Object Modeling; Business Process Modeling / Management (BPM); Client Server Architecture; CMMI; Continuous Deployment & Integration; Data Aggregation; Data Analytics; Distributed Architecture Data Warehouse Design; Extract Transform Load (ETL); Holacracy Coach; Information Lifecycle Management (ILM); Lean/LeSS Coach; Lean Portfolio Management (LPM); Master Data Management (MDM); Metadata Governance; Network Management Principles; Release Train Engineer (RTE/STE); SAFe (Scaled Agile Framework SASM) Certified Advanced Scrum Master; Six Sigma; Unified Modeling Language (UML); Use Case Development & Waterfall SDLC Methodology
- FINANCIAL:** Conversant with Hedge Funds, Managed Futures, Exchange Funds, High Yield Fixed Income Investment Management, Private Equity, Trade Settlement/Trade Processing, Stock Loan and Securities Lending. Leveraging coursework in Corporate Finance, Investment Management, Efficiency of Capital Markets, Futures and Options and International Finance
- GENERAL BI/DA:** @Risk Simulation; Altova XMLSpy; Apache Cloudera Hadoop; Atlassian (JIRA; Confluence); ELK (Elasticsearch; Logstash; Kibana); EMC Greenplum; Github; HP (Autonomy IDOL 10, Vertica); Informatica Powercenter; JetBrains (TeamCity; YouTrack); Microstrategy, New Relic; Oversight Systems; QlikTech QlickView; R; Segment; SnowPlow; Statistical Analytics; Theobald PPV/XtractIS; Tableau; Tibco Spotfire; VersionOne
- ADOBE:** Creative Ste (Acrobat; Captivate; Dreamweaver; Fireworks; Flash; Illustrator; Photoshop & Premiere)
- AUDIT:** ACL Audit Exchange; Alpine Miner; CaseWare (IDEA Server, Smart Exporter SAP Connector)
- CRM/ERP:** ACT; EGroupware; Goldmine; Microsoft Dynamics CRM; Openbravo; OpenERP; OrangeHRM; OroCRM (Symfony); Salesforce; Siebel; SugarCRM
- IBM:** Cognos; Infosphere; Lotus Notes; Netezza; SPSS
- MICROSOFT:** Access; Business Intelligence Development Studio (BIDS); Dynamics CRM; Excel (Pivot Tables, PowerPivot w Slicers, Solver, VBA Macros, Vlookup); Fabric; Lightswitch; PerformancePoint; PowerPoint; PowerView; Publisher; Project; Report Builder; SharePoint Designer; SQL Server Analysis Services (SSAS); SQL Server Data Quality Services (SSDQS); SQL Server Integration Services (SSIS); SQL Server Management Studio (SSMS); SQL Server Reporting Services (SSRS); Team Foundation Server, Visio and Visual Studio
- ORACLE:** 11G; Endeca; Essbase; Exadata; Hyperion Data Relationship Management; OBIEE OBIU ODM & TOAD
- SAP:** Business Explorer (Bex); Business Objects (BO); BusinessObjects Data Services/Integrator (BODS/BODI); Business Warehouse (BW); Crystal Reports; Sybase PowerDesigner
- SAS:** Analytics; BI Dashboard; DataFlux Data Management Platform; Enterprise BI Server; Enterprise Guide; Information Map Studio; MDM Data Integration Server; Web Report Studio
- OS/NETWORK:** Conversant with Apple Mac OSX; AS/400; Canonical Ubuntu; Cisco; Citrix; DOS; ODBC; OpenStack Oracle Sun Solaris / Illumos; Red Hat Linux and Microsoft Windows
- TECHNOLOGY STACK:** JavaScript; LAMP (Linux Apache MySQL PHP); DAX/MDX; Ruby on Rails; SQL and XML/HTML

CAREER OPPORTUNITY ^ EPIC.CAB (Tech IT)

IT SERVICES & IT CONSULTING, TRANSPORTATION, LOGISTICS, SUPPLY CHAIN AND STORAGE

Proven leader with excellent interpersonal and organizational skills, eager to contribute authentic value in the Business Intelligence and Data Analytics arena. Agile Business Analytics Architect / Business Development Manager or Director with 30+ years of professional experience, primarily with *Finance, Agentic Agility, Marketing & Agile Information Technology*. Consulted with *Global Fortune 100* most reputable companies including:

Bank of America Merrill Lynch, BNP Paribas, Citigroup, Fujitsu, ICBC, KPMG, Pfizer, PWC & Wells Fargo.

PROJECT AVAILABILITY W2 OR CORP TO CORP

TSA PRE✓ VERIFIED - KTN (KNOWN TRAVELER NUMBER) READY

ArtChat (Foundassion) 2021 – Present (c2c)
President, AI LLM Agentic (Data Analytics Architect) App/Framework/Platform/Protocol Engineer
Chief Strategic Indicator (LPM) Thriving Agentic Generation (TAG.VOTE) 25+ years of AI TDD

Next Wave Network 2003 – Present (c2c)
President, Coaching Lead (Agile BI Architect)/Solution Engineer (RTE/SM)

- **Agile Appraisal | Assessment | Delivery | Flow | Holacracy | Kanban | LeSS | SAFe**
 - Classroom/Enterprise/Mentor/Online/Program/Portfolio/Team/Virtual Training
 - Certified Scaled Agile Advanced Scrum Master (SAFe SASM Certified)
 - Trained in Implementing SAFe 5 (SPC)



Apex Systems
Bank of America

February 2022 – August 2023 (w2)
 Remote (Charlotte, NC)

GT&O Consumer, Business & Wealth Management Tech Infrastructure (CBWT)



Portfolio Assessment Lead Performance Engineering & Capacity Management (PE&CM)

Enterprise Agile Coach Application Production Services Release Engineering and Core Tech Infrastructure (APSRE); Data, Analytics, and Insights Technology (DAIT/SODPS); ...

Technology Infrastructure (TI) Mobilization – Agile Service Delivery

- ~ \$3.5 – 4 billion (Annual Budget)
- Supported multiple workstreams across the GT&O Consumer, Business & Wealth Management Tech Infrastructure (CBWT)
- Improved Agile Service Delivery by enabling modernization while supporting a workforce of 6,000-12,000
- Necessitated close partnership with senior business and technology managers
- Assessed complex technology project teams and trains across multiple technology, operations, and business units
- Coordinated efforts across multiple technology teams / trains and across multiple projects
- Managed multiple projects across multiple related technology teams
- Demonstrated initiative, ownership, and accessible availability by providing large scale agile coaching support mobilizing GT&O Consumer, Business & Wealth Management Tech Infrastructure (CBWT)

Agile Coaching Support:

Application Delivery Integration (ADI)
 Application Solutions & Integration (ASI)
 Audit GIS Mandates
 ATM, Financial Center, and Real Estate Technology Delivery & Services (ATM)
 BAU
 Banking & Lending Technology (BLT)
 Business Management, Resiliency and Controls (BMRC)
 Business Operations
 CAE (Center for Enablement)
 CIO Business Initiative (HSC)
 Client Facing Platform Technology (CFPT)
 Contact Center
 Core Customer Data Platforms (CCDP)
 Corporate Functions & Data Management Tech APS (CDAPS)
 Custom DB Engineering & Operations

Data Center Exit
 Data Management Technology (DMT)
 Document, Content, and Record Services (DCRS)
 Digital Group Sales and Personalization (DGS&P)
 Enterprise Architecture & Engineering (EAE)
 EDPAS DMT GIS EDGeStability (EDGE)
 Employee Experience Technology (EET)
 Enterprise Risk and Finance Technology (ERFT)
 Global Banking Technology (GBT)
 Global Markets Operations Technology (GMOT)
 Gov & Analytics
 Investment & Banking Production Technology (IBPT)
 Investment Engineering Production Services (IEPS)
 Mainframe
 Monitoring (MON) & Operational Intelligence (OI)
 Never Down

NPT
 Operations
 OPEX
 OpsTech
 Production Governance & Analytics
 Regional Management
 Retail Preferred Small Business Wealth Technology (RPSWT)
 Self-Funded Initiative (SFI)
 Solution Engineering
 Trading Operations Resiliency (TOR) GWIM
 Wealth Management Technology (WMT)

<https://horizon.bankofamerica.com/docs/display/RPCMENABLE/Agile+Maturity+Pilot>

**Apex Systems – Agile Coach**

March 2021 – January 2022 (w2)

**Wells Fargo Agile Coach – EFT (Corporate Risk Technology | Public Affairs & Marketing)** Remote

Provided Agile; Lean; LeSS; Kanban; SAFe coaching services alongside Apex Systems Corporate Risk team, as well as Public Affairs & Marketing team coaches, director, kanban leads, scrum masters, program manager, RTE, program and scaling coach for 21 Corporate Risk Technology and 34 Public Affairs & Marketing teams, including:

ERFT (CARAT - Escalations UI; RAR - Risk Asset Review Target State; RMP - Risk Management Platform)

PAM CVET Video Services, Digital Signage, WFOD, Meetings and Events Planning

- Performed Agile Registry Analysis to understand team composition, readiness, potential impediments.
- Assisted with reviewing and editing of workshop materials, including Agile Team 101, Kanban, Scrum Master, Product Owner, LeSS, Spikes, while aligning towards communication plan that ensured leaders, managers, and team members were to receive cascading information including relevant details about the activities, what to expect, how this affects roles, as well as change readiness evaluation of 51 Corporate Risk Technology and 243 Public Affairs & Marketing team members.
- Tested and assisted in the completion of Agile Health Assessments via interviews with Scrum Masters and Kanban Leads to understand their current knowledge as well as team dynamics and best practices, which supplemented the data that was provided on the registry.
- Attended and coached alongside the team on workshops including Agile Team 101, Kanban, Scrum Master, Product Owner, LeSS, Spikes, with a personal style to maintain focus on continuous relentless improvement, with interpersonal sensitivity, curious inquisitiveness, while also maintaining emotional stability in exploring innovative processes and disruptive thinking, as well as pragmatic options with indicative result metrics.

<https://confluence.wellsfargo.net/display/Agile2020/Corporate+Risk+Agile+Transformation+Home>

<https://confluence.wellsfargo.net/display/PAMAgile>

**Signature Consultants – Agile Coach / Scrum Master**

April 2019 – September 2019 (w2)

Bank of America – GBAMT Global Banking & Markets Tech

Charlotte, NC

SAFe (Scaled Agile Framework SASM) Certified Advanced Scrum Master | Agile Coach | RTE

- Global Banking & Markets Technology Servant Leader (SAFe® - Scaled Agile Framework 4.5 | SASM - Certified Advanced Scrum Master & RTE | Agile Coach) focused on Sales Performance & Profitability Global Data Hub and Reporting space as a potentially new Agile Release Train as well as assisted Treasury & Wholesale Credit Authorized Data Sources teams
- GT&O Global Technology & Operations; GWCDT E2E PORTFOLIO EXECUTION COO GOV
- Scrum Master, RTE, Agile Coach Classroom/Mentor/Online/Virtual Training across teams & trains
- Prepared and coached team agreement alignments, Inspect & Adapt sessions, PI Planning, Scrum of Scrums, PO Syncs, Backlog Refinements, Sprint/Iteration Planning, as well as Daily Standups
- Empowered Dev/Test efforts towards Sprint/Iteration Reviews, Retrospectives & System Demos
- Design and administration of Confluence, Jira and Jira Align custom dashboards

**Signature Consultants – Agile Coach / Scrum Master**

June 2017 – December 2018 (w2)

Bank of America – GT&O Global Technology & Operations;

Charlotte, NC

DQC Data Quality Control; CSWT Consumer Small Business & GWIM Wealth Management Tech

- SAFe (Scaled Agile Framework 4.5 | SASM) Certified Advanced Scrum Master
- Wore multiple hats, including Scrum Master, RTE, PM as well as Agile Coach Training until role was filled
- \$130 Million in 2017 and \$150 Million in 2018 part of Data Quality Control (DQC) Program / Marketing Insights & Technology (MIT) Portfolio Management
- Agile Transformation; Release Train Engineer, as well as assisted as temporary Project Manager
- Managing Multiple IT Project Forecasts, \$3MM+ Budget Plans, Disaster Recovery Triage Activities and Risk Communications to Define, Enhance, Deliver, BAU processes with Marketing Technology applications including Enterprise Market Data Reporting (EMDR) and Application Center of Excellence (ACE) Marketing App (MA) Platforms
- Servant-leader, tracking and removing impediments, while coaching team in SAFe Agile practices.
- Facilitate daily standup scrum, sprint planning, demo, grooming and retrospective ceremonies.
- Shield team from outside distractions and interferences
- Leverage tools and insight to help develop team's predictability and progress (velocity, capacity planning, burndown/burn up charts from Rally to Jira, and other tools and metrics)
- Growing Marketing Application Content Library / Profile Pages on 16,000 iPads:

Marketing App / Lobby Leader

Demo Table / Base

Blue Room (Merrill Lynch)

FSA (Financial Sales Advisor)

Small Business Platform (formerly Seller)

Auto Loans

Business Advantage Term Loans

Better Money Habits (BMH)

CET - Consumer (Lobby, Platform, FSA)

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CET (Cust Engagement Tool) - Digital
CET- Small Business (Lobby, Platform)
Consumer Marketing Tool
Feedback (Lobby)
Full Mobile Banking Simulator
Full Online Banking Simulator
Guided Investing
Handouts (All profiles)
ITR (Invest To Retire)

IYW (Invest Your Way)
Learn 2 Love Your App (Online Banking Sim)
Life Priorities Game
Llama Game Pilot
MEGI (Merrill Edge Guided Investing)
M Edge Individual Retirement Services
Merrill Edge Invest to Retire
Merrill Edge Invest Your Way
MESD (M Edge Self Directed Investing)

Mobile & Online Micro moments
Mobile Banking Simulators
Museums On Us
Preferred Rewards: Benefits Tool
Rate Feed
Seasonal - Travel Rewards
Small Bus Cash & Travel Reward Credit Card

Calculators:

Auto Loan Calculator
Auto Loans: New Purchase
Auto Loans: Refinance
Business Advantage Cash Rewards

Business Advantage Term Loan Calculator
Business Advantage Travel Rewards
Cash Rewards credit card
Premium Rewards credit card

Travel Rewards credit card
Cash Rewards Calculator
Home Banking Calc Handouts Feedback
Preferred Rewards Calculator

For Enterprise Market Data Reporting (EMDR) - See Flagscape for many more reports available - 1.6 TB



Meridian Technologies: Bank of America

October 2016 – December 2016 (w2)

Application & Data Warehouse Architect; Control Function Technology, GFCC

Charlotte, NC

NOTE: Meridian was one of many Preferred Vendors that lost Preferred Vendor status; so, all remaining contracts were not extended; GFCC underwent re-org to CFT

- Prepare for 2017 Global Financial Crime Control/Technology GFCC/CFT Architecture including:
 - Remediating specific gaps in coverage, sourcing data, developing scenarios, controls, re-generate or re-process alerts, validate/verify scenarios, plan to evaluate, select and install a scenario optimization tool to reduce false positives, considering effects of digital disbursements via bulk payments
 - Discuss Digital Disbursements via Bulk Payments
- Primary Architect on Detection Channel Platforms like ADCP, CW, WW, SPIRIT, MANTAS (America/EMEA)
- Met Richard Weber, Chief of Criminal Investigation at Internal Revenue Service and processed current challenges, including siloed information sharing, independent agents not collaborating enough, cyber-crime and identity theft
- Correlate GFCC Technology Capabilities: Mainframe, Oracle, Teradata, Big Data, .NET, Java, SAS, etc.
 - Emerging Technology: Hadoop, MongoDB, Vaadin, Drools, etc
 - Three Tier-1 applications which are integrated with payment systems and other money movement engines
 - 400+ data feeds per day are processed by 36 global applications
 - 3.5B transactions per day are monitored by AML and Economic Sanctions systems
- 1000+ user base across the globe leveraging global solutions



JumpStart: Medikly

Director of Technology | Agile Coach

October 2014 – October 2015 / October 2016 (w2)

New York, NY

- Supported CEO in implementing technology plan, by advising on current and projected future technical challenges
- Managed \$150M monthly across several dozen technology partners, including over half dozen outsourced development teams as well as Classroom/Mentor/Online/Virtual Training of teams' Product Manager as an Agile Coach
- Led Agile methodology focused SCRUM meetings as Product Owner and Scrum Master, as well as directed one-on-ones
- Architected many integrations on Rackspace Cloud and AWS [EC2 (Elastic Compute Cloud), NoSQL DynamoDB, Redshift, RDS (Relational Database Service), S3 (Elastic Compute Cloud)], including Automated Insights (WordSmith); BrandWatch; CKAN; DHIS2; ELK (Elasticsearch, Logstash, Kibana); GitHub; JetBrains (TeamCity, YouTrack); Lumify; Narrative Science; New Relic; Segment; StatSocial; SnowPlow on a PHP/Symfony/MariaDB/MySQL/PostgreSQL based framework
- Guided strategic planning and technical vision to ensure overall success in sustaining elastic modular growth of platform
- Excelled in providing aggressive turnaround leadership, by driving productivity gains with the growing team of partners
- Simplified the complexity of daily operation by benchmarking best in class support and security of the technology & data
- Coordinated the direction for development, implementation, continuous integration, continuous deployment, scaling data aggregation in physician focused clinical data warehouse design to be capable of 100s of terabytes of data
- Executed delivery of the Medikly marketing automation platform to empower pharmaceutical and advertising agencies to outperform global competition, by accelerating the synthesis of disparate data to aggregated information, and in turn transforming critical business intelligence, enabling clients' wisdom to make world class decisions



e-Biz Technologies: Diageo

July 2014 – October 2014 (w2)

Senior Project Manager / *Agile Coach*, Data Analytics & Rep. Architecture (BRM N. America / GDBS) Norwalk, CT

DIAGEO

- Managed knowledge transfer from 8-12 Infosys partners to a 3-6 person Agile team with Agile Coach responsibilities
- Assisted management of Diageo Insights Analytics vision for presentation to Global CIO & CFO
- Designed and Implemented complex Tabular cubes in SSAS/SSDT 2013 and Excel 2013 interpreting MDX/DAX for creating PowerPivot, PowerView and Power-Map Visualizations deployed to users using Office 365 and SharePoint 2013
- Picked up where Infosys team left off by developing Enterprise Analytics for NA Diageo Insights Data warehouse
- Created Source to Target Mappings, Conceptual, Logical and Physical Data Models using TOAD Data Modeler for various sources like Oracle databases(11g), Flat files, FTP, Excel, Theobald PPV/XtractIS, SAP: Business Warehouse (BW) / Business Explorer (BEx) / BusinessObjects Data Services/Integrator (BODS/BODI), etc
- Created Enterprise reports using SQL Server 2014, Visual Studio 2013 (SSDT/SSIS) and Excel 2013. Reports and Dashboards included drill down reports, parameterized reports, linked reports, sub reports, filters, slicers, charts for Profit and Loss (P&L), Income & Expense, Planning & Forecasting, Demand & Supply, Finance, Inventory Management, New Opportunity Locator (Discovery) and Business Process Management (BPM)
- Conducted Design Review Meetings, Technology Upgrade workshops and Report training for End Users, helping Users use Excel 2013 as a Self Service Power BI model reducing dependencies on the Developers & Analysts to check Data Integrity
- Reverse Engineered reports in Microstrategy 9 & re-designed them in Excel 2013 PowerView & PowerPivot using Tabular Cubes in SSAS
- Designed and implemented complex ETL transformations by developing, scheduling and deploying complex packages using SQL Server Data Tools 2013 (SSIS)
- Managed Deployment, Job Schedules and ETL process including designing complex script tasks, using BULK transformations, look up transformations, fuzzy lookup transformations, MERGE-JOIN, derived columns and data transformations from several servers / sources as well as multiple file types



Analysts: Honda Aero

February 2014 – May 2014 (c2c)

Lead Microsoft BI Trainer (Fujitsu engagement)

Burlington, NC

- Gathered training exercise requirements for Oracle Developers looking to enable a Microsoft Data Warehouse
- Lead Microsoft Power BI Training in SharePoint, SSAS, SSIS and SSRS
- Developed SSIS packages for Honda Aero team to replicate connecting to additional data sources



Meridian Technologies: Bank of America

October 2012 – December 2013 (w2)

Senior Data Architect / *Agile Coach*, SSIS, SSAS, SSRS & SharePoint App. Dev. (End User Computing) Hopewell, NJ



- Introduced Risk Aggregation and Discovery tools, while acting as Agile Coach & Product Manager (EUCDW)
- Constructed End User Computing data-warehouses for reports displayed on SharePoint
 - Designed SSRS reporting and Implemented SSAS Tabular/OLAP Cubes for: Instant Messaging, Email (Exchange, Public Folders, Routing and Secure Email), Hosted Virtual Desktop, SharePoint and WebEx Product Management teams
- Developed VS/SSIS packages using 2012 project configuration, For, Foreach and Sequence loop containers, many types of stored procedures, generated variables and executed TSQL statements (bitmask manipulation with row_number analysis in CTE, Merge and other SCD components to update or insert)
- Coordinated big data efforts with Splunk team
- Compiled requirements from a variety of product managers across End User Computing
 - Analysis of requirements and creation of the BEAM model spreadsheet for about 200 reports
 - Utilized the Agile Data Warehouse Design Modelstorming Methodology with SCRUM
 - Defined categories for SLAs/Key Performance Metrics (KPIs) across a variety of dimensions
- Leveraged Microsoft Project and Team Foundation Server to coordinate Agile Data Warehouse Design efforts
 - Assisted in implementation of web-based work item tracking system using TFS 2012/2013
- Designed an architecture for new environment to use to support SQL 2012 SSAS / SSIS & Tabular data stores
- Documented server deployment build process of replacing existing reporting infrastructure
- Built out 10 development servers according to the build document
- Gained access and documented all source data systems
- Worked with a custom data extractor for exporting of data from Oracle, Netezza, SharePoint or MS SQL
- Creation of Conformed User and Organization dimensions based on Active Directory and other data sources
- Managed development and delivery of several tools including an InfoPath CRM (Product Management Call Sheets); Lightswitch interface (Public Folder Remediation); many PowerView/PowerPivot Excel reports tied to cubes and Adobe Captivate videos.



eTeam: KPMG

May 2012 – August 2012 (w2)

Data Analytics Architect, Information Technology Services (ITS Enterprise Architecture) Montvale, NJ / NY, NY



- Documented attributes and Business Process Modeling / Management (BPM) around data analytics licensing
- Mapped technical entities between information asset taxonomy and pilot technical intake questionnaire
- Developed Licensing Inventory Management Database: included Support, Training, Performance Metrics & SLAs
- Implemented foundation for governance process around Information Lifecycle Management (ILM), including Business Object Modeling; Client Server Architecture; Distributed Architecture Data Warehousing; Metadata Governance; Network Management Principles; Unified Modeling Language (UML) with Use Case Development.
- Defined infrastructure environment necessary to support applications architecture
- Prepared continuous improvement options CMMI, Six Sigma and Agile Development Methodology with SCRUM.
- Participated in researching production test Pilots, vendor scorecard, Key Performance Metrics (KPIs) and business function Proof of Concepts and Proof of Technology evaluations including:

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| <ul style="list-style-type: none"> • ACL Audit Exchange • Alpine Miner • Apache Cloudera Hadoop • CaseWare [IDEA Server, Smart Exporter SAP Connector] • EMC Greenplum • HP [Autonomy IDOL 10, Vertica] • IBM [Cognos, Infosphere, Netezza, SPSS] | <ul style="list-style-type: none"> • Informatica Powercenter • Microsoft BI Tools [Business Intelligence Development Studio (BIDS); SQL Server Analysis Services (SSAS); SQL Server Data Quality Services (SSDQS); SQL Server Integration Services (SSIS); SQL Server Management Studio (SSMS); SQL Server Reporting Services (SSRS)] • Oracle [Endeca, Exadata, OBIEE, OBIU, ODM] • Oversight Systems • R Statistical Analytics | <ul style="list-style-type: none"> • SAP Business Objects • SAS [Analytics, BI Dashboard, DataFlux Data Management Platform, Enterprise BI Server, Enterprise Guide, Information Map Studio, MDM Data Integration Server, Web Report Studio] • Tableau • Tibco Spotfire • QlikTech QlikView |
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Genesis10: Merrill Lynch | Bank of America

June 2011 – February 2012 (w2)

Agile Coach/BA/PO Managed Data Platform Architecture Team, Global Markets Op Technology Jersey City, NJ



- Documented Financial Securities Operations Data Structure Design
- Translated technical requirements into stories
- Uncovered associated Information Lifecycle Management (ILM) workflows, data and business rules as well as define acceptance criteria based on real world scenarios, utilizing Business Object Modeling; Business Process Modeling / Management (BPM); Client Server Architecture; Distributed Architecture Data Warehousing; SLAs/Key Performance Metrics (KPIs); Master Data Management (MDM); Metadata Governance; Network Management Principles; Unified Modeling Language (UML); Use Case Development+Scrum meetings transitioning from Waterfall to Agile SDLC Methodolog
- Derived Trade Settlement, Straight Through Processing, Post Trade Processing fields and mapped data transaction messages for developers from CSW (Client Service Workstation) Application to the Managed Data Platform, a large scale distributed system, with replication, disaster recovery, metadata governance, retiring potentially 270 legacy applications, using Altova XMLSpy, PowerDesigner, PowerView/PowerPivot in Excel, SharePoint Designer, Visio, Atlassian JIRA, etc
- Coordinated communication with cross-functional team in order to provide status updates
- Highlighted project risks to management
- Delivered cross-functional team members Agile/Scrum Methodology news communication and training
- Managed an offshore team with project re-platform from SQL Server 2000 to SQL 2008 Clustered Environment



Addison Search Transition: ICBC Financial Services bought Fortis Division from BNP Paribas Sept 2010–March 2011 (w2)

Custody Lead Development Data Architect / Product Manager, Clearing and Financing Reporting New York, NY



- Gathered system requirements via Agile/SCRUM design sessions to determine scope and ensured appropriate functional specification in technical documentation as well as additional roles like Product Owner and Agile Coach
- Visualized data flow requirements in Visio by exploring Business Object Modeling; Business Process Modeling / Management (BPM); Extract Transform Load (ETL); SLAs/Key Performance Metrics (KPIs); Information Lifecycle Management (ILM); Master Data Management (MDM); Metadata Governance; SQL; Unified Modeling Language (UML); and Use Case Development
- Lead product design discovery and development of database architecture, further optimization, testing and debugging routines in SSRS, SSIS, SQL Server 2008, Business Intelligence Development Studio (BIDS), Access and Excel with Visual Basic for Applications (VBA)
- Mapped data relationships, schema and procedures to produce a Data Warehouse with Data Mart models encompassing the entire SDLC, leading to the Custody Reporting Platform delivery of 34 English and Mandarin Chinese Reports per client
- Covered Reporting on Stock Loan, Securities Lending, Custody Positions, Trade Settlement & Post Trade Processing
- Applied detailed knowledge of design principles and user needs to ensure that user interfaces were of high quality, extremely usable, performed well and were consistent across product line
- Conducted design walkthroughs, demos and functionality feedback sessions with internal stakeholders



Randstad (2002-2009): Citigroup

May 2008 – March 2009 (w2)

CEP Officer, Operations and Technology – CTI Financial Control: Capital Planning and Analysis New York, NY

- Ensured \$Millions in capital expenditures and commitments were properly evaluated, reviewed & approved
- Collaborated with line of business CFOs and Directors to facilitate IT Project Management



Randstad (2002-2009): Merrill Lynch
Senior Capital Analyst, Retirement Group – Global Private Client (GPC)

November 2007 – April 2008 (w2)
 Hopewell, NJ



- Developed and produced analytics around key business initiatives related to asset retention
- Interpreted results of analytics produced and provided a clear and succinct summary to management
- Executed strategies by managing projects and working with other key business units that support the initiative
- Responsible for improving the level of business intelligence collected by the RES team, by determining what data should be collected by RES and then oversaw all aspects of data management, including campaign deployment and analytics, data integrity, representative CRM tool usage rates, and the integration with the Dynasight reporting system
- Produced task integration with Access, Acxiom, Campaign Automation Tool, Citrix, Excel, Lead Management System, MIDAS, Siebel, Oracle Hyperion Data Relationship Management and Essbase, SQL, PowerPoint, Word
- Scrubbed prior relationships against Do Not Call records
- Researched Information Lifecycle Management (ILM) workflow across data warehouses, including working on Business Object Modeling; Business Process Modeling / Management (BPM); Distributed Architecture Data Warehousing; Extract Transform Load (ETL); Key Performance Metrics (KPIs); Master Data Management (MDM); Metadata Governance; SQL; Unified Modeling Language (UML); and Use Case Development
- Improved business intelligence by developing data analytics around asset retention, new customer acquisition, lifetime value, and trends



Randstad (2002-2009): Merrill Lynch
Senior Marketing Analyst, International Wealth Management and Insurance

September 2007 – November 2007 (w2)
 New York, NY



- Designed Business Intelligence reports to gage print use and web traffic
- Constructed Key Performance Metrics (KPIs) and data analytics queries



Randstad (2002-2009): Merrill Lynch
Six Sigma Analyst, Global Support Services

June 2007 – August 2007 (w2)
 New York, NY



- Revamped business intelligence Key Performance Metrics (KPIs) to reduce employee air, rental and hotel expenditures by aggregating data analytics from travel partners



Randstad (2002-2009): Reed Elsevier
Electronic Production Engineer EPD US Periodicals

November 2005 - January 2007 (w2)
 Philadelphia, PA



Reed Elsevier

- Led efforts to establish wiki platform, while communicating with journal managers to implement quality control of medical journal's online PDF and XHTML content. Attended XML-Group discussions, directly related to the work environment



Randstad (2002-2009): Merrill Lynch
Client Relationship Management Consultant, Equity Sales CRM

January 2005 – November 2005 (w2)
 New York, NY



- Analyzed Custom CRM workflow to convey usability and effectiveness through focus groups
- Assessed and communicated priorities for portfolio managers, to help improve productivity, translating requirements via Business Object Modeling; Business Process Modeling / Management (BPM); SLAs/Key Performance Metrics (KPIs); Unified Modeling Language (UML); and Use Case Development



Randstad (2002-2009): Merrill Lynch
Sarbanes Oxley Consultant, Global Technology and Services

July 2004 – December 2004 (w2)
 New York, NY



- Executed relevant document retrieval from divisional managers, to comply with SOX regulations
- Organized Key Performance Metrics (KPIs) deliverables for Accountants and Internal Auditors



Randstad (2002-2009): Merrill Lynch
Global Sales Specialist, Alternative Investments Group

March 2003 – October 2003 (w2)
 Princeton, NJ



- Clarified financial analysts' inquiries to evaluate multiple investment vehicles provided by the Alternative Investments Group e.g. Hedge Funds, Managed Futures, Exchange Funds and Private Equity products



Randstad (2002-2009): Merrill Lynch
Reconciliation Analyst, High Yield Fixed Income Investment Management

August 2002 – March 2003 (w2)
 Princeton, NJ

- Reconciled Fixed Income Security Trade Settlement and Post Trade Processing by communicating with analysts at accommodating banks

ADDITIONAL DATA SCIENCE INTEREST

- Develop projects with IDEs, including Visual Studio Code, Jupyter, Spyder, and RStudio
- Analyze with Dask, numpy, pandas, and Numba
- Visualize with Matplotlib, Bokeh, Datashader, and Holoviews
- Create machine | deep learning models with Fabric, Scikit-learn, Tensorflow, h2o, and Theano

UNDERGRADUATE INTERNSHIPS & PROFESSIONAL EXPERIENCE

UPMC Falk Computing and Media Center
Computer Consultant

January 2000 – December 2001
Pittsburgh, PA

Solved Microsoft Windows and Apple Mac OSX computer software and hardware desktop support issues.



Whiz Bang Labs
Development Tester for Artificial Intelligence Engine

January 2000 – December 2000
Pittsburgh, PA



Big Words
Campus Marketing Consultant

January 2000 – December 2000
Pittsburgh, PA and San Francisco, CA

Stimulated brand awareness among campus individuals and organizations using high-energy marketing.



The Knowledge Conservancy
Director of Development

April 2000 – December 2000
Pittsburgh, PA

Developed vision with board members & produced informational literature to target industry administrators.



Price Waterhouse Coopers
Consultant

May 1999 – August 1999
New York, NY

Prepared extensive PowerPoint presentations, including charts, graphs and Key Performance Metrics (KPIs).
Managed Excel spreadsheets and Microsoft Access database.



Pfizer
Consultant, International Manufacturing Information Technology

May 1998 – August 1998
New York, NY

Updated technical documentation from IBM AS/400 Mainframe to Lotus Notes database.



Pfizer
Consultant, International Pharmaceutical Product Development and Training

May 1997 – August 1997
New York, NY

Increased global sales and marketing effectiveness for the Pharmaceutical Development and Training Group.



Unisys, Data Entry

1995 – 1996, Lawrenceville, NJ

EDUCATIONAL EXPERIENCE

University of Pittsburgh:
Martial Disciplines
Language Skills

BSBA in FINANCE
Aikido, Judo, Karate and T'ai Chi Chuan
Chinese (Mandarin), Farsi (Persian) and Spanish

Phi Eta Sigma (National Honors Fraternity)

LEADERSHIP EXPERIENCE**Student Government Board*****1 of 8 board members representing over 18,000 students***

- Improved effectiveness of campus organizations by consolidating events & announcements to events.pitt.edu Web Portal.
- Carried out accountability measures to improve board members' understanding and fulfillment of student needs.
- Information Technology Senate Committee; Senate Committee on Computer Usage; Multicultural Council.
- Reinitiated Environmental Committee.

Business Student Council***Business Manager and Public Relations***

- Reengineered constitution and leveraged personal network to increase event-planning involvement.

Asian Students Association***President***

- Increased membership from 50 to over 800 using multiple marketing strategies. This expansion fostered amplified financial support as a governance organization from the University administration.

East Coast Asian Students Union***National Executive Board; Financial and Communication Coordinator***

- Launched national involvement and fostered continued participation through recruitment of young leaders.

Sound Manifest***Executive Producer***

- Consulted for events around Pittsburgh including production of 3 Fashion Shows.

Outdoors Club***Public Relations Committee***