

## **PROFESSIONAL SUMMARY:**

- Business Analyst, Project Manager, and Test Coordinator who successfully manages small and large enterprise development projects through the full project life cycle. Fosters communication between business and IT to enhance healthcare, banking, and back office brokerage applications
- Adept at eliciting major client requirements, collaborating with multiple technology teams, and implementing solutions that ultimately impact application performance, utilization, and function
- A solid team player with management experience and fluent communication skills who particularly enjoys the hands-on role of assisting clients with business analysis
- Experienced user of Microsoft Office, Microsoft Project and Project Server, Visio, SharePoint, Quality Center, HP ALM, Mercury TestDirector, SQL, NetXPro, Intuit Quickbase, and legacy mainframe applications

## **PROFESSIONAL EXPERIENCE:**

### **Centers Plan for Healthy Living, Staten Island, NY**

**August 2016 - January 2018**

#### **Senior Business Analyst**

- Responsible for requirements gathering, design, development, creating system and user acceptance test cases, testing, and documentation of configuration enhancements and workflows to Case Trakker tool to meet the needs of several different departments. Projects included:
  - Assessment changes for Intake, Social work, and Care Management departments
  - Created new and modified existing SQL Queries and reports for Enrollment, Utilization Management, Intake, Social Work, Care Management, Provider Service, Quality, Grievances and Appeals and Complex Care departments
  - Created/Modified all letters for CPHL for first year
- Completed Fax project for Utilization Management which automated 1,000 faxes per day
- Served as project leader for MAP new Line of Business, coded all changes for Marketing and Enrollment Departments

### **MphasiS consulting, New York, NY**

**August 2011 - August 2016**

#### **Testing Coordinator, Scenario Manager Regulatory Reporting, Client: JP Morgan Chase**

**October 2013 - June 2016**

- Involved in Functional, Regression, Integration, End-to-End, Performance, and Ad-Hoc testing of the application
- Created and executed system and user acceptance test cases, managed defects, reported testing status using HP ALM v11, and maintained test and traceability matrices
- Participated in setup of test environment and performed smoke testing on test environment after code deployment
- Coordinated with cross application teams on functional test cases and dependencies and worked on ad-hoc requests
- Performed extensive regression testing for every build performing manual/black-box testing of the application to test the system for both positive and negative scenarios

### **Project Manager/Business Systems Analyst, Client: JP Morgan Chase**

**August 2011 - August 2013**

- Managed three off-shore business analysts in the development of use cases and testing models for payments, payment request, swap merge and payees for QuickPay ClearXChange (CXC) and RealTime projects
- Participated in requirements gathering, architectural design, and wireframe review
- Created use cases for Mobile Android Alert and Chase Wealth Management on Mobile projects

### **Bank of New York Mellon, New York, NY**

**January 2011 - May 2011**

#### **Corporate Trust, Control Group Vice President**

- Successfully managed an Interim Readout project; created project plan for KCA Testing project and maintained project status and decks for reporting to senior management and stakeholders
- Maintained Budget to Actuals for Ernst and Young consultants

**Ascend Consulting, New York, NY**

**February 2007 – June 2010**

**Client: Credit Suisse IT Project Services Americas**

**March 2010 - June 2010**

- Responsible for creating monthly FID PMO eCommerce and FX PowerPoint deck
- Wrote user manual on creating PMO PowerPoint deck from eCommerce and FX sources

**Senior Consultant, Client: JP Morgan Chase Clearing Corp Conversion project**

**May 2009 - September 2009**

- Drove an initiative that incorporated feasibility analysis, utilization and technical implications of the Bear Stearns trading system and platform with additional responsibility for successful conversion from Bear to Chase Investment Services retail clients
- Elicited requirements for multiple financial products including fixed income, equities, and mutual funds for financial product back office systems to ensure accurate process documentation flows in relation to Bear Stearns applications and communication to the Chase Investment Services clients
- Collaborated with Account Services, Balance & Control, Cashiers, Margin, Money Market, Mutual Fund, Mutual Fund Setup, Retirement Services, Statements/Confirms/Return Mail and Operations teams to facilitate and scribe operation guide reviews for 15 workstreams determining pain points in converting the retail clients
- Reviewed and corrected Ascend Business Analysts' updates to operations guides from facilitated sessions
- Maintained Conversion Specific Items Requirements document; updated Operations Analysis Project Plans

**Senior Consultant, Client: Deutsche Bank, Fulcrum Reporting Testing project**

**May 2008 - April 2009**

- Responsible for heading Issue Resolution Management in a mission-critical role to reconcile current state and future state reports for the entire Switzerland Asset Management LOB
- Provided hands-on management of the testing process for a 30 person international team of business, technical and vendor personnel, including facilitating and scribing daily issues meetings
- Remotely managed five off shore testers, provided them with mentoring, guidance and an on-shore presence to review testing findings with the stakeholders in the United States
- Using Mercury Test Director, maintained up to 1,000 open defects and drove them to resolution through proactive follow-up with third party providers, Deutsche Bank PMO, Business and Technical stream leads
- Generated project statistics and detailed data analysis regarding issues and testing progress for senior management
- Monitored and reported daily status of the testing effort to stakeholders

**Client: HSBC Private Client Services, Fully-Disclosed Outsourced Clearing with Pershing**

**Dec 2007 – April 2008**

- Managed and contributed content for an enterprise-wide platform migration from Broadridge (ADP) to Pershing
- Responsible for documenting PMO status and twice-daily UAT and Quality Center meetings
- Created over 1,000 step-by-step UAT test cases for 13 work streams, and represented the Ascend UAT team at Quality Center meetings and assisted business users with executing UAT test cases using NetXPro
- Facilitated and scribed back-office and middle-office operations stakeholders meetings and meetings between HSBC personnel, Ascend Consulting, and Broadridge (ADP)
- Utilized Mercury TestDirector to enter user acceptance defects; presented project deliverables to stakeholders

**Client: Deutsche Bank Geneva Conversion Reporting Analysis project**

**August 2007 – October 2007**

- Responsible for reporting inventory and gap analysis to recreate legacy reports in new platform
- Tested newly developed versions of the MS Access-based reporting repository; created custom report specifications in Excel; Performed knowledge transfer to Deutsche Bank employees.

**Client: Citibank Anti Money Laundering (AML) / MIS reporting**

**March 2007 – May 2007**

- Facilitated requirement gathering meetings across functional units, and created report specifications from variable data points and performed information gap analysis for new reports.



**BurrellesLuce, New York, NY**

**November 2001 – September 2006**

*Senior Project Manager*

- Established a Project Management Office utilizing a structured and repeatable process for initiation, design, system/user acceptance testing, and production verification for all projects while supervising a Project Manager
- Implemented a web based Task/Issue tracking system utilizing Intuit's Quickbase for the entire IT department
- Provided Management with statistical data by creating issue/task trend analysis reports
- Improved timeliness of updates by creating an automatic update request email based upon task/issue finish date and created a link between Quickbase tasks and the helpdesk system
- Implemented Replicon timesheet system for charge back to the business of the 40-person IT department

*Project Manager*

- Gathered requirements for over 400 tasks related to electronic reading, content search engines, and NewsExpress solutions, which scanned and searched terabytes of data encompassing 10,000 newspapers and 5,000 magazines
- Deployed Timeclock system that saved the cost of the legacy AS/400 system and human capital savings
- Successfully Implemented Media Directory Online, a web-based application MS SQL-Server, VB, and Oracle

**Plural, New York, NY**

**November 1998- July 2001**

*Project Manager*

- Developed the following web-based systems: a reporting Engine for White Amber, an Activity Planning System for Rainbow Media Holdings, an iBanker Release 1.1 Design for Donaldson Lufkin & Jenrette and various enhancements for the Port and Targus web sites for Targus Inc.
- Managed the successful development of client/server based systems including Research Advantage for CIBC Oppenheimer (Visual Basic and Excel); Imagine iGateway for Imagine Networks (C ); Bio Client 2.5, Bio Production and NewsExpress Implementation for Burrelle's (Visual Basic and Microsoft SQL Server)

**Chase Manhattan Bank Brooklyn, NY**

**June 1986 - October 1998**

*Vice President, Client Delivery Services*

- Responsible for end user liaison, analysis and design, tool and technology evaluation, implementation, project management, and testing for all systems developed. Also hired and trained employees and consultants
- Created Year 2000 scripts in MS Test and SQA Robot to validate Year 2000 compliance for both the mainframe and Micro Chase Trader and Chase Payments software
- Managed 10 developers for the Bank's On-Line real time Foreign Exchange Trading System, Chase Trader Windows, which utilized Microsoft Visual C++, Microsoft Visual Basic, Crystal Reports, and Microsoft SQL Server
- Managed the development team for the Bank's Chase Payments System, under the Insight Windows Platform
- Managed implementation of a Reuters rate feed on Sun UNIX and LU62 to IBM Mainframe, and coded a PC and Sun UNIX based Electronic Software Delivery System and Implemented Tymnet X25 link from customers to Sun UNIX
- Coded in C and Btrieve the development of Global Custody's DOS based entry system for Trades, Money Movements, FX, Corporate Actions, and Appros/Expros. Coded the Financial Reporting System (FRS) for historical data collection, mergers and acquisition forecasting, and financial modeling in Lattice C (DOS and UNIX).

**EDUCATION:**

**Brooklyn College** Bachelor of Science in Computer and Information Science

**Project Management Institute** Project Management Professional (PMP), 2007

**Knowledge Movers** PMP Certification Training, Jan/Feb 2007

**AFFILIATIONS:**

Member of the Project Management Institute and PMI's New York City chapter