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Business Analyst   **Technical Business Analyst**

SUMMARY

I have over 30 years IT experience, including 12 years as a business analyst, 6 of them senior. I understand business processes in a wide range of industries, especially investment, wealth, superannuation, insurance and banking. I have demonstrable experience in large and complex projects in the largest organizations in these industries. My current areas of specialization are business requirements, process analysis, and documentation. I am looking for roles that require the skills stated below, and that will recognize and reward passion, dedication, initiative and professional competence.

PROFESSIONAL SKILLS

Skill	Demonstrated at Company / Project
• Organising and conducting requirements workshops and sessions with business users at all levels.	SunSuper (Page 2) MLC CRM project (Page 4)
• Eliciting functional and non-functional business requirements, and ensuring they are clearly understood through effective communication and review.	SunSuper (Page 2) MLC CRM project (Page 4)
• Researching and documenting "As-is" and "To-be" states	AMP Cannes Project (Page 5) Powerlan Garradin (Page 6
• Mapping and analysing business processes.	AMP Cannes Project (Page 5) Powerlan Garradin (Page 6)
• Translating functional requirements into technical specifications. Providing effective translation between the technical and business aspects of a project.	AMP Compensation (Page 4) ING In-specie (Page 5) Powerlan Garradin (Page 6)
• The end to end selection, delivery and implementation of business systems and software.	Powerlan Garadin (Page 6) AZB Systems (Page 7)
• Contributing to large-scale business remediation, integration and migration programs.	AMP Project Cannes (Page 5) ING In-specie (Page 5) MLC CRM project (Page 4)
• Stakeholder management and engagement.	AMP Letters-2 (Page 3) MLC CRM Project (Page 4)
• Excellent written communication skills acquired via study (Graduate Certificate in Writing from UNE) and the creation of many business documents for some of Australia's largest financial services companies.	AMP, MLC, Powerlan, AZB
• Highly articulate verbal communication skills, developed by conducting requirements and planning workshops, customer sales and business case presentations throughout my career. I can comfortably work well with all levels of internal management and staff, outside clients and vendors.	MLC, NAB, AMP, Powerlan, AZB
• A refined soft-skill set, based on patience, listening and empathizing. I am open minded and flexible, but will strongly promote concepts I believe in, when they will benefit the enterprise.	Developed from experience in all my roles and assignments
• Hands-on software development, if or when required	*JPCars (Page 2) ; Wideline (page 6) ; Powerlan Garradin (Page 6)*

CAREER EXPERIENCE

Please note that I have worked as a contractor, a consultant, and as an entrepreneur for periods of my career. This means that I have performed some short assignments, and there have been periods where I have worked on multiple projects in the same time period. There is not room to list all projects here, but they are all documented and I can drill down for more details when asked.

Mar 2013 – June 2017 – Owner, Webmaster and IT development manager - James Parker Chauffeur Cars

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In developing this company from absolutely nothing to its sale 4 years later as a successful going concern, I had to both become a dynamic entrepreneur, and at the same time return to a more hands-on software development role.
I could leverage a lot of my corporate IT and customer service experience, but I needed to rapidly acquire knowledge and experience of modern digital marketing methods in a hands-on way.

Responsibilities

- Developing business processes for booking, scheduling, dispatching, personnel management and customer service.
- Developing technology processes and systems, including a booking web site, and back-end administrative apps. You can see the website at [www.jpcars.com.au.](www.jpcars.com.au) The technology used was PHP / MySQL/ Javascript./ AJAX
- Building an adaptive mobile app to improve the customer contact experience.
- Defining successful Google and Facebook ad campaigns to target landing pages for offers and deals designed to capture leads.
- Successful employment of email marketing tools (MailChimp, AWeber, WordPress)

Achievements

- Learning more broadly about digital marketing, app development and website design than I could have done as a dedicated business analyst.
- Building a successful company with low admin costs due to a high level of automation.
- Selling the enterprise as a successful and stable going concern.

Feb 2016 – March 2016 – Senior Business Analyst - SunSuper

Situation

I was able to take time out during the James Parker period to perform short-term assignments as a senior BA.

SunSuper wanted a cloud-based mobile facility for travelling investment managers to track and share data about global fund managers and investment products. It needed document management, diary and contact-management functionality, with world-wide portability and 24/7 access.

Responsibilities

- Engaging stakeholders to determine business requirements and write a business requirements specification.

Achievements

- I discovered an existing framework for developing requests for proposals for vendors which not only speeded up the requirements process, but also made the document more suitable for the tender process.

Sep 2015 – Oct 2015 – Senior Business Analyst – Greencross Vets

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Situation

Having recently acquired Greencross Veterinary Clinics, the Petbarn group wanted to integrate Greencross management reports into a new scorecard and dashboard suite based on a data warehouse.

Responsibilities

- Conduct one-on-one and seminar-based requirements sessions with senior management.

- Prepare a requirements analysis for the business intelligence reporting of the Greencross business. Being an Agile project, these needed to be structured around user stories and wireframes.
- Specify functional drill-down reports and scorecards.

Achievements

- I managed to drill-down further into the non-functional requirements not implicit in the initial user stories. Among these were the need to deliver significantly improved response times, better visual presentation of key information, and a focus more on identification and drill-down of exceptions.

Oct 2012 – Feb 2013 **Senior Business Analyst, NAB, North Sydney**

Situation

I joined BI (Cross-sell), a marketing project aimed at uplifting cross-sell opportunities across the NAB banking and MLC wealth management products and customers.

Responsibilities

- Deliver a data analysis aimed at both cleansing data throughout the MLC product systems (Heritage and modern) and uplifting customer identification keys across diverse systems in preparation for implementation across the group of the Oracle Customer Hub (OCH).

Achievements

The ultimate objective of this project was to uplift cross-sell capability by 50 – 70 percent. I delivered a report, backed with extensive data analysis, to demonstrate how this could be achieved.

Mar 2012 –Jul 2012 **Senior Business Analyst, Westpac Institutional bank, Sydney**

Situation

I joined the IPV (Independent Price Validation) project team tasked with building a CADIS-based central data hub for sourcing, calculation, validating and distribution of rates, prices and associated metrics consumed by the bank.

Responsibilities

- To produce functional specifications for sourcing, uploading and normalising a number of data sources related to commodities, bonds, swaps, options and futures.
- Configure the calculation and distribution processes once this data had been sourced.

Achievements

I made a significant contribution to the project's major achievement – the elimination of costly, error-prone, time-consuming manual intervention through hundreds of spreadsheets and replacing them with automatic real-time processing of data feeds into a consistent and validated data warehouse.

Sep 2011 –Jan 2012 **Technical Business Analyst, AMP Financial Services, Circular Quay**

Situation

I returned to the compensation team (see entries for 2007 – 2009) for an enhancement project (called letters-2) to reduce costs by optimising letter generation using data mined from the Enterprise Data Warehouse.

Responsibilities

- Produce business requirements for extracting evidence of retirement, death, receipt of pension benefits, etc, that could lead to lower-cost options for the payment of compensation, yield better tax outcomes for customers, and simplify the process of letter generation.
- Produce technical requirements for restructuring business rules to cope with life claims and reversionary beneficiaries, both of which were previously paid manually.

- Engage IT teams to build the solution
- Design integration and UAT test plans

Achievements

- The end result of the project was to automate the AMP compensation applications that were previously manually processed by IT analysts and so allow them to be automated and run by BAU.
- The solution ultimately saved over $400,000 per year in admin and mailing house costs

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Apr 2010 – Aug 2011   Senior Business Analyst, MLC, North Sydney

Situation

I was a key member of the CRM project. Its objective was to extract data from the newly acquired Aviva, consolidate it in the MLC enterprise data warehouse using Oracle technology, and then build an integrated marketing intelligence data mart on the NAB Teradata platform. Then finally to develop interfaces to exchange leads between the data mart and various CRM systems including Siebel and SalesLogix.

Responsibilities

- Liaise with marketing managers, SME s in Customer Analytics and Business Intelligence, call centre managers, product development and product team leaders.
- Document business requirements for the marketing campaign strategy, and then determine and prioritise data elements, business rules and data governance principles.
- Document business requirements for supplying the MLC enterprise data warehouse with Aviva data to integrate with the existing MLC schema.
- Design system integration and user acceptance test programs, using automated scripts where possible.

Achievements

- The data I helped deliver into the NAB Teradata platform was subsequently used for lead generation and trend analysis; with the benefits exceeding $50M by the end of FY12 (the original target was just $2.4M).
- The project set the benchmark for data migration at MLC / NAB, with other projects quickly picking up where we left off.

Nov 2007 – Dec 2009   Senior Business Analyst, AMP Financial Services, Circular Quay

Situation

I was part of the compensation projects team. The objective was to automate compensation for errors in administering superannuation, investment and insurance products.

My role was in the communications stream of the project, where a letter-writing application was produced that generated thousands of letters, each one customised for the product(s) and the customer circumstances.

Responsibilities

- Liaise with senior product managers, the head of product tax, senior legal advisors, the head of unit pricing, senior actuaries, and IT management. A major part of the effort was to gain stakeholder agreement on the business rules that dictated letter wording.
- Scope systems and processes, produce options for developing the solution, and make recommendations.
- Write business requirements then functional specifications for solution components.
- Design the SQL-Server schema and stored procedures.
- Prototype and document the solution.
- Supervise programming by the developers using VB.Net and Transact-SQL.
- Design User Acceptance Test (UAT) programs, and monitor their execution.

Achievements

- The applications have now become a valuable part of compensation management at AMP.

- They have greatly increased the reliability of compensation payments and customer communication. They have led to widespread cost reductions through automating processes that previously required manual, actuarial and customer service intervention.

Jul 2007 – Oct 2007   Senior Business Analyst, ING Australia, Sydney.

Situation

I was the business analyst attached to the unit pricing application development group.

Responsibilities

- Develop specifications for In-Specie Superannuation-to-Pension transfer pricing.
- Develop test and implementation plans. Co-ordinate UAT testing.

Achievements

- The In-Specie Super-to-Pension process development and implementation was trouble-free and allowed ING to offer more competitive unit prices to clients transitioning to retirement, and thus delivering added value to the adviser community.

- I also developed a SAP upgrade business plan for IT management during a 5 day hiatus in the main project.

May 2005 – Aug 2006   Business Analyst, AMP Financial Services, Circular Quay

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Situation

I was part of the AMP Financial Services unit pricing remediation team, in project "Cannes" whose objective was to implement end to end improvements to AMP's unit pricing systems and processes following a KPMG report.

Responsibilities

- Liaising with investment managers, actuaries, IT solution architects, and the relationship managers responsible for the AMP / BNP / AMP Capital Investors (ACI) co-operative arrangement.
- Designing, documenting and implementing improved business processes and software for the transmission of daily unit prices from the asset manager (BNP Paribas) to AMP's unitised investment management applications.
- Designing and implementing an incident management tool for use by all parties to the unit pricing process.
- Writing an in depth technical and user manual for the Daily Investment Linked Cash System (DILCS). This was the major application in AMP Financial Services and AMP Capital for daily cash management and resulting market instruction.

Achievements

- Simplifying system design and process change from what was originally proposed, thereby saving the program over $1 million and still achieving a low risk assessment.
- I received commendation widely for the manual, which solved so many problems in understanding the day to day workings of a critical system.

Feb 2003 – Apr 2005 and Sep 2006 - Apr 2007   Solution Architect, Wideline, Tuggerah, NSW

Situation

Wideline are an Australian manufacturer of aluminium doors and windows.

At the time, they had a problem where disparate legacy systems were neither achieving the goals of Enterprise Resources Planning (ERP), nor serving as adequate platforms for Business Intelligence. Management felt that both these outcomes were necessary to maintain competitive advantage.

In the first engagement, I was asked to build an enterprise data warehouse to effect the rationalization, de-duplication and cleansing of customer data across platforms and integration of the resulting data mart with Customer Relationship Management. In addition, I was required to put in place a business intelligence and reporting framework.

In the second, I was asked to enhance the supply chain systems by developing a material requirements planning (MRP) application, and integrating it between the existing inventory and purchase order applications.
I reported to the financial controller and to the managing director

Responsibilities

- Gather, document and prioritise business requirements.
- Scope the projects in terms of systems affected, interfaces and integration.
- Present alternative design and technical approaches, with recommendations.
- Create and manage project plans based on the decisions made.
- Perform database modeling and design
- Set up and test ODBC facilities for application integration
- Supervise programming in Progress, VB and Crystal (Business Objects) of the components.

Achievements

- Enhancing the performance and competitive strengths of the business.
- Reducing inventory carrying costs.
- Reducing the incidence of material shortages by 70%.
- Raising the order fulfillment from below 80% to 95%, stopping leakage of repeat business.

Nov 2001 – Dec 2002 **Solution Architect, Catholic Church Insurances (CCI), Melbourne**

Situation

CCI, a Garradin User (see next entry), were finding it expensive and labour intensive to demonstrate compliance with APRA capital adequacy and investment allocation guidelines. I was engaged through CCI's risk managers, Midwine Pty Ltd, to work with senior management to develop an automated and reliable investment analysis tool.

Responsibilities

 To conduct a requirements analysis, then recommended solutions.
To design and build a SQL-Server data warehouse as a repository for investment positions and trades in equities, bonds, bills, credit instruments, forex and derivatives.
To develop a BI and reporting engine to automatically schedule, run, manage and notify multi-step analysis and reporting tasks with interdependencies.

Achievements

- As a result, CCI had the ability to calculate, sort and classify by risk-related properties such as duration, exposure adjusted value, convexity, credit risk and counterparty exposure, across its whole portfolio.
- The costs of APRA compliance, previously fully manual, were reduced by 75%.

May 1998 – Nov 2001 **Senior Consultant – Implementations, Powerlan, Sydney**

Situation

Previously, AZB systems (in which I was a partner) had developed "Portfolio Manager", a Hi-Portfolio style funds management application. In 1998 we sold the Portfolio Manager business to Powerlan who renamed it "Garradin". This product is still sold and serviced by Bravura.
During this period, Powerlan engaged me to manage implementations.

Responsibilities

Varied slightly from site to site, but usually involved the following:
- Develop a high level implementation plan.

- Document business requirements; perform GAP analyses; specify and cost changes.
- Assist customers with business case preparation and evaluation to scope a modification plan.
- Supervise programming and testing of modifications.
- Co-ordinate business process analysis, data take up and preparation of processing cycles.
- Conduct group training sessions, in the processes, functionality and use of the product.
- When necessary, prepare a data migration plan and manage its execution.

Achievements
- I helped transition the Garradin product to a new target market of larger fund managers.
- I created successful Garradin implementations at QBE Insurance, HiH Insurance, Glebe Asset Management, NSW Office of the Protective Commissioner (OPC), and Cardinal Securities.
- I helped transition Garradin from a $75,000 product targeted at medium fund managers to a $500,000+ product targeted at large financial institutions.
- I created a customisable implementation plan for Garradin that shaved about 15% of Powerlan's implementation costs.
- I created three major new Garradin modules by productizing custom-developed material – Performance and Attribution (from Glebe), Unit trust and Cash management trust (OPC) and Automated Corporate Actions (HiH). These modules could lift the price of a new sale by $300,000 (in 2000 dollars).

Jan 1991 – May 1998   Partner in AZB Systems, St Leonards.

Situation
AZB Systems was a software house created to develop the Portfolio Manager product. However, it needed to retain general customers for bespoke software development projects to provide development and marketing funds for "Portfolio Manager". Throughout this period, my involvement shifted from the design and development of Portfolio Manager and parallel delivery of projects for other clients, into full time product management and selling of PM.

Responsibilities
To customers: providing excellent customer service and high quality products.
For the Portfolio Manager product:
- Preparing functional specifications
- Data base design and management
- Development (programming and testing)
- Documentation at all levels
- Providing sales and pre-sales support

For other clients:
- All SDLC Activities, as required.

Achievements
- Creating a strong, quality product based on equities, fixed interest, derivatives, money market and general ledger.
- Developing a strong initial user base including Bankers Trust, CS First Boston, Vic State Super, Vic State Trustees, and Catholic Church Insurances
- Selling Portfolio Manager and its customer base to Powerlan.

Early career

The formative education and experience that qualified me for the "Portfolio Manager" challenge was:

- Freelance software developer

- Pre-Sales Application Consultant at Digital Equipment Corporation, Chatswood
- Database Systems Engineer at Cincom Systems, Crow's Nest
- Graduate Trainee, Programmer, Systems Engineer at NCR Australia, North Sydney

My early career involved many interesting projects, challenges and learning curves. They are all fully documented and will soon be published on my web site. I can provide any further information on request.

EDUCATION / PROFESSIONAL

- Post-graduate certificate in writing at the University of New England, NSW
- BA (Hons) in Mathematics from the University of Essex (UK)
- Member of The Australian Computer Society (MACS)

Plus extra training courses in : Accounting • Programming • Systems analysis • Selling Skills • Marketing • Business Development • Data Base theory and design • Futures and Options • Trust Administration • Project Management • Business Process modeling • EAGLE PACE Performance & Analytics

PUBLICATIONS

- "Persuasive Writing" © 2016 A guide to writing for business
  Can be downloaded at: www.perdoc.com.au/BookDownload

REFERENCES

Available on request.

TECHNOLOGY SNAPSHOT

PHP • Mendix • Kony • Mailchimp, Wordpress, ORACLE • Teradata • SQL Server • MySQL • Progress • Informix • ODBC • Visual Basic • VB.Net • SQL • UML • Business objects • COGNOS • SalesLogix • Siebel • Eclipse/Talisman • HiPortfolio • Garradin • HTML • XML • Javascript • Frontpage • ASP.NET • IIS • Apache • Sharepoint • Visio • Access • Word • Excel • Publisher • MS Project • 4TQ • TLM • Mavim • COBOL