

Timothy Reed
Senior Business Analyst / Project Manager

SUMMARY

- Senior PMP-certified **Project Manager, Business Analyst, and Agile Product Owner** with a strong **technical background** as well as extensive experience with **Prime Brokerage** reporting, operational flows, and client on-boarding.
- Comfortable working with development, support, business/operations, and clients.

Capabilities:

Management - Lean Agile process, Waterfall methodology, product development, and complex document management

Subject Matter - Prime Brokerage, Hedge Fund Accounting, Trade Capture, and Fixed Income products

Technical - SQL queries, Perl, Python, and UNIX scripting, Excel macros, Java, and Angular

Software - JIRA, Advent Axys, Balsamiq, Microsoft Office, Datawatch Monarch, and SWIFT

CERTIFICATION

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

TRAINING

- SDM SAFe Product Owner-Product Manager (PMPO)
- SDM Lean – Agile for Teams
- Fundamentals of Product Management, Sequent Learning Networks
- Advanced MS Project Workshop, Project Management Institute NYC Chapter

PROFESSIONAL EXPERIENCE

Bank of America Merrill Lynch, Equity Services Technology – New York, NY Apr 2017 - Present
Senior Business Analyst / Project Manager / Agile Product Owner

Project Description/Scope: Project Manager responsible for migrating the delivery of ~100K PB and Broker Dealer daily reports to a strategic platform.

Responsibilities/Deliverables:

- Worked with stakeholders to develop a project charter, business requirements, and project plan, in order to refactor work estimates, schedule, and important milestones.
- Developed the migration schedule by analyzing report volume and client service tier.
- Worked directly with account service team, client on-boarding, and key clients to agree on testing criteria, review results, and ensure no post-migration impact on service levels.
- Developed functional requirements for dev team to automate steps required for each migration.
- Published biweekly metrics for senior management to show migration actual progress vs baseline.
- Collected and reviewed lessons learned at the end of each migration and at the conclusion of the project.

Project Description/Scope: Agile Product Owner responsible for developing a web-based activity and position data on-demand query tool with consolidated, multi-asset-class capabilities.

Responsibilities/Deliverables:

- Worked with business sponsor to analyze business needs, perform competitive analysis, and develop vision statement.
- Created dashboard and Kanban in JIRA, developed themes, epics, features, stories and acceptance criteria, and populated the backlog.
- Prioritized features using WSJF analysis.

- Participated in all ceremonies, including sprint planning, retrospective, daily stand-ups. Championed the approach to the team.
- Lead weekly grooming sessions with project team, and demos to business users.

Project Description/Scope: Business Analyst on a multi-year project to migrate the bank's PB books and records, and related clearing and settlement flows, from a legacy mainframe to modern platform.

Responsibilities/Deliverables:

- Met with stakeholders and documented current process for managing daily client billing and trade figuration, including rules for calculating credit and debit interest spreads and stock loan fee rebates.
- Documented all client billing terms sheets to develop the use cases to be supported by the new system.
- Analyzed ~700 types of internal and external-facing data extracts, to determine whether each is in use, document its content and purpose, and identify which functional business area should ensure its migration to the new platform.
- Analytical tools used included an Excel dashboard to prioritize, plan, and track; code inspection to understand logic; worksheet to reconcile data to statements to understand content; SQL to extract raw client data, and Perl and shell scripts to perform keyword searches of a massive volume of SharePoint-hosted legacy documentation.

Freelance

Jan 2016-Apr 2017

Project Manager / Business Analyst

Project Description/Scope: Consulted on short term projects for remote global customers.

Responsibilities/Deliverables:

- Developed an operational run book to manage a complex quarterly client billing process. Documented the legacy manual steps with operations and client service team members to define business requirements for the new process. Created GANTT chart to show start/end times, process slack, and bottlenecks.
- Authored detailed RFP for a data analysis platform with BI, ETL, and EDW components. Performed all related analysis, including legacy and future state system, competitor, and market. Interviewed prospective bidders.
- Worked with bidder's SMEs to develop responses to government-issued RFP for nationwide data delivery and inventory management platform.
- Created complete PMP training material for PMP R.E.P.-certified educational organization.

Citco Fund Services (USA), Inc. – Jersey City, NJ

Sep 2008 - Sep 2015

Senior Project Manager / Business Analyst

Project Description/Scope: Responsible for all project management and business analysis related to trade capture and data extracts.

Responsibilities/Deliverables:

- Analyzed vendor file specs to define business requirements for multi-asset-class Risk Metrics position file.
- Managed migration of 100s of legacy client-facing data extracts to latest version.
- Managed project to automatically extract data from broker PDF-format swaps statements and deliver to the internal reconciliation platform, thereby eliminating a resource-intensive manual process.
- Responsible for moving client-facing trade capture and data extracts to a new strategic accounting back end, as part of a firm-wide books and records migration.
- Established change management process with IT and global client service teams in order prioritize business needs, develop BRDs to understand the actual client need, and define acceptance criteria, traceability matrices, and test criteria to improve quality.

- Developed Excel macro-based tools and documented process to automate extract regression testing, resulting in 80% fewer post-release bug-fixes.

Lehman Brothers – New York, NY
Product Manager / VP

Jun 2007 - Sep 2008

Project Description/Scope: Responsible for client-facing web applications, including trade capture, wire transfers, standing settlement instructions, cash wires, on-demand reporting, and customizable landing pages. Also worked with client service to resolve certain client-facing issues.

Responsibilities/Deliverables:

- Managed the design and implementation of user-customizable client portal home page.
- Created BRD, FRD, RTM, wireframes, and use cases related to development of web-based cash wires app.
- Worked with business leaders, IT staff, and product managers, and UI/UX designers.
- Coordinated resolution of longstanding client-specific issues to improve relationships with key clients.

UBS Securities LLC – New York, NY
Product Manager / Director
Business Analyst

Jan 2003 - Jun 2007
2005 - 2007
2003 - 2005

Project Description/Scope: Managed development of the trade capture and client reporting software platform for Fixed Income Prime Broker middle and back office.

Responsibilities/Deliverables:

- Managed development of trade capture, settlement, and consolidated cross-product reporting software, with interfaces to back office settlement systems.
- Worked with internal and external stakeholders to define data extracts for third parties.
- Involved with integrating Advent Axys, Geneva portfolio management systems.
- Defined consolidated fixed income, listed derivatives, FX, repo financing, swaps, equities position, cash flow, and P&L reports.

Credit Suisse – New York, NY
Prime Broker Development Manager

JP Morgan – New York, NY
Senior UNIX Systems Engineer/Administrator

Credit Suisse – Tokyo, Japan
Front Office Trading Systems Manager

Objective Technologies – New York, NY
Founder/Technology Startup

EDUCATION

- Undergraduate studies, School of Visual Arts, New York, NY