

Drew Williams

Calgary, AB (Hybrid; open to Toronto relocation) | 403-618-6113 | bdrewwilliams@gmail.com | LinkedIn: <https://www.linkedin.com/in/drew-williams-ai-strategy> | Portfolio: <https://www.itfrombit.ca>

PROFESSIONAL SUMMARY

Early-career consultant/analyst focused on technology strategy and operating models. Experience translating ambiguous business needs into requirements, roadmaps, and executive-ready outputs. Built analytics tooling (Python/SQL dashboards, valuation engines). Led a compliance/operations platform integration that reduced vendor spend by \$120K annually. Comfortable with cloud, ERP, and digital workplace. Strong Excel/PowerPoint; clear storyteller; delivers under tight timelines. Uses AI tools to accelerate analysis, drafting, and quality.

CORE COMPETENCIES

Technology Strategy; Business-IT Alignment; Operating Model (product/platform, governance); Requirements Elicitation and Validation; Stakeholder Management; Roadmaps; Portfolio/Initiative Triage; SDLC Awareness; Agile Fundamentals; Problem Structuring and Root Cause Analysis; Business Cases and KPI Frameworks; Financial Modeling (DCF, IRR, EPV, waterfalls); Data Analysis; Dashboard Prototyping; AI-Assisted Analysis; No-Code Automations.

EXPERIENCE

Independent Builder - AI & Financial Software - Calgary, AB | 2023- Present

- Elicited requirements, identified use cases, and produced pilot roadmaps aligned to KPIs; collaborated with stakeholders in ambiguous settings.
- Prototyped valuation/risk analytics (Python/Excel) and FP&A tooling; memo-first reporting flows with scenario toggles for repeatability.
- Delivered executive-ready decks/dashboards; emphasized clarity, traceability, and reproducibility.

Rosen Capital Advisors - Financial Analyst - Los Angeles, CA | 2016-2020

- Led compliance/operations platform integration; reduced vendor spend by \$120K/year; improved cadence across Legal, IT, and Operations.
- Built P&L and VaR dashboards integrating trade/risk data; accelerated analysis cycles; supported IC materials and stakeholder communications.
- Coordinated cross-functional inputs; aligned assumptions/reconciliations; maintained version control for repeatable analysis.

Private Equity (Summer Analyst) - Olson Cross and Alamo - New York, NY | 2015

- Analyzed \$350M-\$3.5B transactions; built IRR/waterfall models; drafted investor memoranda and diligence summaries.

EDUCATION

Haskayne School of Business, University of Calgary - B.Comm, Finance (Distinction) | Graduated 2025

- GPA: 3.9/4.0 (last 90 units) - Haskayne Resilience Scholarship

SKILLS & KEYWORDS (ATS - DELOITTE TST)

Technology Strategy; Transformation; Operating Model; Target Operating Model; Business-IT Alignment; Cloud; Infrastructure; ERP; Enterprise Applications; Digital Workplace; SDLC; Agile; Product and Platform; Portfolio Management; Requirements; Roadmap; Governance; KPI; Financial Modeling; DCF; IRR; EPV; Due Diligence; Valuation; SQL; Python; Excel; PowerPoint; Power BI; Tableau; Data Analysis; Presentation and Storytelling; Stakeholder Management; Change Management; AI Tools; Automation; Continuous Learner; Team Collaboration; Toronto (relocation).