

# Drew Williams

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## PROFESSIONAL SUMMARY

Early-career consultant/analyst focused on technology strategy, operating models, and AI-enabled problem solving. Experienced translating ambiguous business needs into requirements, roadmaps, and executive-ready outputs. Built analytics tooling (Python/SQL dashboards, valuation engines) and guided stakeholders through change. Led compliance/ops integration delivering \$120K annual savings and faster reporting cadence. Thrive in fast-paced, collaborative environments.

## CORE COMPETENCIES

Technology Strategy; Business–IT Alignment; Operating Model (product/platform, governance); Requirements Elicitation & Validation; Roadmapping; Portfolio & Initiative Triage; SDLC Awareness; Agile Fundamentals; Problem Structuring & Root Cause Analysis; Business Cases & KPI Frameworks; Financial Modeling (DCF, IRR, EPV); Data Analysis; Dashboard Prototyping; AI-Assisted Workflows; Change Management.

## EXPERIENCE

**Independent Builder — AI & Financial Analytics** · Calgary, AB | 2023–Present

- Partner with clients to map processes, surface requirements, and produce technology strategy playbooks with phased roadmaps and governance models.
- Develop analytics tooling (Python/SQL) with scenario toggles and documentation; enable reuse and transfer to client teams.
- Deliver executive-ready packs and change management guides aligning technology initiatives with business outcomes.

**Rosen Capital Advisors — Financial Analyst** · Los Angeles, CA | 2016–2020

- Led compliance/ops platform integration; aligned stakeholders, defined requirements, and rolled out processes resulting in \$120K annual savings.
- Built analytics dashboards supporting risk and operations; translated data into recommendations for partners and executive committees.
- Prepared strategic planning materials, operating model updates, and scenario analyses to guide investment decisions.

**Private Equity (Summer Analyst) — Olson Cross & Alamo** · New York, NY | 2015

- Authored investment memoranda and operating model assessments for \$350M–\$3.5B deals; coordinated cross-functional diligence teams.

## 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 TS&T)

Technology Strategy; Transformation; Operating Model; Business–IT Alignment; Roadmap; Governance; Portfolio Management; SDLC; Agile; Change Management; Requirements; KPI; DCF; IRR; Python; SQL; Excel; AI Tools; Stakeholder Management; Toronto; Hybrid.