

# DOMINIC MANGONON

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## EXPERIENCE

### CITI

*Senior Vice President, Citi Transformation Senior Lead (03/2022 – Present)  
Contractor / Consultant via Matrix Resources (09/2021 – 03/2022)*

New York, NY  
2021 - Present

### Enterprise Transformation

Serve as a key execution lead on the firm's highest-priority strategic initiatives, from regulatory Consent Order remediation to the transformation of the enterprise risk and control framework

- Developed and delivered three strategic dashboards for the CEO and Board of Directors, reconciling data sources and taxonomies across Citi's business lines and functions to deliver impactful insights required for executive decision-making
- Improved the quality and timeliness of regulatory remediation across Citi by designing and launching a new senior oversight function and committee to centralize governance and implement standardized requirements for all Matters Requiring Attention (MRAs)
- Established and oversaw implementation of new global standards for program and project management, strengthening unified oversight and controls for an enterprise-wide portfolio of 15,000+ projects
  - Recruited and managed a team of two direct reports and led cross-functional working groups to define and implement the standardized requirements for reporting and quality assurance.
  - Secured on-time closure of 4+ critical regulatory commitments by successfully validating sustainability of new and enhanced controls with senior risk and audit partners
- Overhauled the financial governance framework for a ~\$7.1B technology and business investment portfolio through the design and implementation of new standardized requirements for cost estimation, tracking, and variance analysis, directly improving on-budget project delivery
  - Lead efforts to re-engineered data architecture for over 150 strategic investments to provide visibility into of ~\$1.1B of investment spend
  - Leveraged AI-powered tools to code and automate previously manual End User Computing (EUC) processes and author new streamlined procedures and guidance material

### MORGAN STANLEY

*Assistant Vice President, Corporate & Institutional Solutions*

New York, NY  
2019 – 2020

### Business Unit Strategy

Led a portfolio of projects to build and pilot a new business model targeted to the firm's ultra-high-net-worth and family office client segment, resulting in ~\$15B of new assets under management (AUM)

- Designed and launched a "white-glove" concierge service model to meet the complex needs (e.g., onboarding, analytics, reporting) of the firm's largest wealth management clients
- Aligned leadership on the need for expanded trading products and capabilities; advised on strategic decisioning to build solutions "in-house" vs. via a third-party partnership
- Led efforts to pursue a strategic partnership with a leading global custodian bank; outlined partnership business requirements and oversaw the RFP / vendor selection process
- Conducted field interviews with the firm's top Financial Advisors to understand client pain points and prioritize firm resources towards key strategic opportunities and other critical matters
- Served as a relationship manager to an early-stage startup and technology partner, providing recommendations on app development and advising on business, risk, and regulatory considerations

### TRELIANT, LLC

*Senior Consultant, Wealth & Asset Management Advisory*

New York, NY  
2018 – 2019

### Business Development

Worked with leadership to develop and launch an advisory practice for a PE-backed boutique consulting firm

- Co-authored 3 white-papers and identified 10 "go-to-market" campaigns for prospecting new business
- Managed risk and regulatory engagements which included oversight of over 40 contracted workers

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**STRATEGY& (formerly BOOZ & CO.) — Part of the PWC Network**

**Chicago, IL**

*Senior Associate, Financial Services Strategy Consulting (07/2015 – 10/2017)*

**2014 – 2017**

*MBA Intern, Banking & Capital Markets Management Consulting (06/2014 – 08/2014)*

## Target Operating Model

Identified ~\$14M in run rate savings for an international subsidiary of a leading insurance broker as part of a global cost and organizational restructuring effort

- Worked closely alongside the CFO and other senior leadership to construct a business case which modeled cost savings & investment required to centralize operations in both near and offshore sites
- Led multiple branch workshops to understand business process pain points and identify both “quick win” and technology-enabled solutions to optimize operations and increase savings

## Market Segmentation

Created a customer segmentation and migration strategy for a large wealth management client, increasing advisor capacity & productivity by ~5% and reducing fiduciary risk by \$465M

- Led working sessions with leadership to align on strategic objectives and define key guiding principles
- Designed processes, reporting and tools for financial advisors to review books-of-business, identify migration exceptions and maximize cross-sell opportunities to other areas within the bank
- Successfully executed the migration of 32,000 low-balance clients to self-directed service channels

## Client Experience & Change Management

Designed an end-to-end experience across the client lifecycle for a large wealth management firm, working with leadership to create stakeholder personas, customer journey maps and use cases

- Accelerated strategic objectives through the creation of a learning & development curriculum and segmentation of the financial advisor population, enabling more-targeted coaching and training
- Designed an oversight structure to strengthen accountability and align incentives to goals and metrics

## Growth Strategy

Evaluated organic and M&A related growth opportunities for a leading online brokerage

- Conducted research and analysis to size an opportunity to capture ~\$2T in AUM resulting from an industry shift of investible assets towards online and independent brokerage models
- Identified a preliminary list of potential acquisition targets to complement existing business capabilities and unlock additional growth, ultimately leading to the ~\$4B acquisition of a competitor

## BNP PARIBAS CORPORATE & INSTITUTIONAL BANKING

**New York, NY**

*Client Services Analyst, Commodities Brokerage (07/2010 – 05/2013)*

**2008 – 2013**

*Rotational Analyst, Trading Operations (07/2008 – 07/2010)*

## Operations & Process Optimization

Supported various trading desks and middle / back-office functions as a new graduate rotational analyst

- Facilitated workshops for a Six Sigma initiative resulting in a realignment of the organizational structure of the Fixed Income Documentation Team, improving trade processing time by ~10%
- Developed process controls and VBA macros to reconcile erroneous trades, eliminating potential overnight risk exposure and standardizing reporting procedures to meet with regulatory standards

## EDUCATION

### CARNEGIE MELLON UNIVERSITY, TEPPER SCHOOL OF BUSINESS

**Pittsburgh, PA**

*Master of Business Administration (MBA), Concentrations: Information Systems, Finance*

**Leadership:** Consulting Club (V.P., Member Development), Graduate Student Assembly (Class Representative), Consortium Fellow, Merit Scholar

### RUTGERS UNIVERSITY, RUTGERS BUSINESS SCHOOL

**New Brunswick, NJ**

*Bachelor of Science (BS), Major: Finance*

## ADDITIONAL INFORMATION

**Technical Skillsets:** MS Office 365 (Expert), Data modeling tools (PowerQuery, SQL)

**Interests:** Travelling (visited over 55 countries / 5 continents); trekking, snowboarding, live music; DIY electronics & circuitry, NY sports teams