Gayle MBA, CSM

7329641315 [shivani@apextgi.com](mailto:shivani@apextgi.com)

# Certified Scrum Master & Program Manager in Financial Applications

|  |  |  |
| --- | --- | --- |
| Strategy Definition & Execution | Program Management | Technology Management |
| Process Re-Engineering | RFP Management | Liquidity & Risk Management |
| Change Management | Treasury Mgmt. Solutions | Customer Relationship Mgmt. (CRM) |

* Over 20 years of experience as a Senior Program Management Lead specializing in financial applications across various industries.
* Proven team leader with a track record of solving complex problems and managing projects across the full lifecycle, including budgeting, resource allocation, cost-benefit analysis, and scope/change control.
* Expertise in overseeing large-scale enterprise finance operations and technology projects, encompassing project governance, stakeholder and vendor management, business case development, and comprehensive project planning and execution.
* Successfully led multidisciplinary business and technology teams in the development and implementation of complex systems, strategic planning, team growth, SLA management, and coordination with offshore teams and vendors.

# Key Skills

* + Financial Accounting – General Ledger, Sub ledger, Reconciliations, Charts of Accounts
  + CRM – Salesforce
  + Treasury Solutions - Kyriba
  + FRB Regulatory Reporting initiatives in Domestic and Foreign Bank (Basel III / Liquidity Management)
  + Project and Program Management (Jira, Confluence, Celoxis, MS Project, SharePoint)
  + Change Management, Contract Negotiations & Change Governance

# Education

* + MBA– Business Computer Information Systems, CUNY Baruch College
  + Master of Science – Financial Accounting & Auditing, University of Mumbai, India
  + Bachelor of Science – Financial Accounting & Auditing, University of Mumbai, India

## General Atlantic New York, NY Sep 2022 – Present

**Sr. Program Manager/Project Manager**

* Private Equity firm - Led global implementations of leading cloud platforms and services, including Kyriba for Treasury Solutions, Salesforce CRM, and enhancements to Investor Portals for Limited Partners and Coinvestors.
* Directed global program implementations, chaired C-suite and Executive Project Steering Committees, and managed project reporting.
* Developed product roadmaps, tracked budgets, maintained project plans, crafted communication strategies, conducted end-user and administrator training, and oversaw vendor relationships.
* Developed and managed project portfolios with a focus on risk management, resource allocation, and stakeholder communication to drive successful outcomes.
* Provided strategic guidance to senior leadership on project prioritization, resource allocation, and investment decisions based on thorough analysis and forecasting.

## Proskauer New York, NY Aug 2019 – Sep 2022

**Sr. Program Manager/Project Manager**

Implementation of Core Aderant General Ledger across the firm

* Managed a project portfolio of $6+ million across multiple lines of business. Provided thought and concept leadership in business case definition and program inception.
* Conducted feasibility study on build vs. buy and managed RFP’s / Vendor selection interviews
* Delivered a plan for business and support group operational readiness for product launch.
* Defined and executed a business case to deliver on a General Ledger Platform along with outsourced services and a hosted back-office solution.
* Re-engineered data and process flows to attain a future state vision of 70% reduction of effort and time
* Accountable for the overall program governance (facilitating steering committees, communicating with all levels of the organization including executive management).

## Citibank New York, NY Aug 2015 – Jul 2019

**Program Manager/Project Manager** (Vice President)

Globally managed initiatives and led requirements gathering for the Liquidity Management Platform (AQUA) covering the Loans and OTC Derivatives businesses to meet critical Regulatory requirements.

* Led Derivatives programs by managing project deliverables through weekly engagements with Treasury, Business Desks, and Technology functions.
* Supported global development teams by defining technical requirements through bi-weekly scheduled releases while performing quality testing for data and enhancement features to drive project completion.
* Delivered firm’s strategic Collateral and Liquidity risk management MIS platform for dealing with expected liquidity surplus and deficits based on secured finance transactions (SFT’s) on Equities & Fixed Income.
* Led Core capabilities projects creating a centralized reference data hub - providing a common data layer for all programs to ensure one view for all, leading to improved data quality, standards and transparency.
* Provided strategic and tactical solutions for Prime Finance business, with a strong focus on formulating, designing and delivering IT solutions in the Securities lending and Financing areas.

## Credit Suisse, New York, NY Mar 2008 – Aug 2015

**Project Manager** (Vice President)

Accountable for daily and monthly MIS Balance Sheet Reporting across the firm and providing accurate balance sheet signoff daily / monthly for IHC (Intermediate Holding Company) including accurate Balance Sheet Data for NSFR Reporting.

* Accountable for variance analysis across all products (inventory, repos/slbs, loans/deposits, derivatives, open trades/fails) day over day and month over month.
* Co-ordinated regional teams from America and Asia on Basel II Capital calculation & Collateral treatment.
* Designed Basel II templates to calculate capital impact on new business that is not captured in the Calculation Engine strategically.
* Provided guidance on the Treasury Liquidity Project to establish an acceptable BAU process for Intercompany reconciliations from ARTS data to the ledger.
* Managed the Large Exposure Reporting (LER), at Ultimate Counterparty Level, for Americas Region and implemented the calculation engine to ascertain the maximum loss that would occur if a particular large counterparty to the bank defaulted.

## UBS Financial Services Inc. Weehawken, NJ Aug 2006 – Mar 2008 Business Analyst / Project Manager (Associate Director)

Led the migration of the General Ledger Module from legacy system to GEAR for Tax and Regulatory Reporting group.

* Formed strategy and managed risk & contingencies to maximize effectiveness of testing with downstream clients.
* Simplified the understanding of reference data as it moves and transforms from one system to another for line of business by presenting end to end mapping, transaction flows and building data dictionary.
* Conducted gap analysis between the legacy application and GEAR to identify additional data sources and created mapping documents between the Legacy General Ledger account numbers to GEAR

# Additional Relevant Experience

## Apex Technologies, Edison, NJ

**JPMorgan Chase - Business Analyst / Project Manager**

Migrated Investment Banking legacy reporting applications to CIT. Conducted gap analysis between the legacy application and the CIT to identify additional data sources required. Conducted Strategic vs. Legacy Data Reconciliation, Data Attribute Gap Analysis and Reference Data Mapping

## Freddie Mac - Business Analyst / Project Manager

Requirement gathering for Retained Portfolio Transaction, WAB (Weighted Average Balance), FAS 115, Book Value Report, 2002 Pushdown and L&C (Liquidity and Contingency) Portfolio.

## Makro Technologies | United Health Group Sr. Business Analyst



Business analysis for PHA (Personal Health Account) – enrollments, claims, Premiums and HIPAA compliance.