Rahul Kole

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**Professional Summary**

* Qualified professional with 9+ years of proven excellence in Project management and Business Analysis in banking and finance domains with expertise in Project Management including managing large projects with cross functional teams.
* Eliciting business requirements and proficient in translating them into various Business requirement documents (BRD), Functional requirement documents (FRD)
* Identified and integrated new AI technologies into the platform, resulting in a 20% increase in accuracy data analysis.
* Experience in Developing product strategy and roadmap for AI-based products
* Identify and develop products and work with development teams to design, develop and launch AI-based products.
* Strong knowledge of Core Banking System, Retail and Commercial banking business, products, policies, and procedures. And strong in Investment/Retail banking, financial statements, cash flow, financing structures, Capital Management, Asset Data, Fixed Income, Portfolio Analysis, Stock Valuation, Capital Structures and Budgeting, Value Based management.
* Experience in understanding, analyzing, and documenting Business Requirements, Functional Specifications, Business Process Flow, Business Process Mapping, and Modeling.
* Gathered, maintained, and prioritized system requests to include documenting them as requirements to help the team with bug fixes and enhancements for Veeva CRM and related systems.
* Solid experience in Finance Industry, Investment banking, Retail banking, Commercial banking, Credit Cards, Mobile Banking and Mortgage Services.
* Responsible for setting the vision for the Onboarding and delivering products for clients.
* Experience in implementation, configuration, design, analysis and understanding of SFDC CRM Application.
* Extensive experience in Finance industry, Credit Cards, Investment Banking (GL-General Ledger, Personal Accounts, Check payment, ATM, Fraud - AML) and Mortgage industries.
* Strong Knowledge of UML, RUP, Waterfall, Agile Technologies, JIRA, SAFe and Rational Requisite Pro.
* Proficient in developing Use case scenarios to enable design and development of applications using tools like Rational Requisite Pro, JIRA and VersionOne based on the SDLC methodology.
* Attained Project Management Professional (PMP) certification from the Project Management Institute (PMI).
* Applied PMP knowledge areas and processes to drive project success, ensuring adherence to industry best practices.
* Expertise in using Microsoft Visual Studio Team System for requirement management and work item tracking.
* In depth knowledge Rational Unified Process (RUP) methodology, Use Cases, Software Development Life Cycle (SDLC) processes, Object Oriented Analysis and Design (OOA/D).
* PMP Certified
* Experience in specializing in statistical analysis, data analytics, Tableau, and PowerBI.
* Strong background in analyzing and creating business intelligence reports to drive operational improvements.
* Extensive experience in Conducting Market Research, Feasibility Studies, and Risks Analysis
* Experience in conducting GAP analysis, User Acceptance Testing (UAT), SWOT analysis, Cost benefit and ROI analysis.
* Experience with Banking Payments Systems Experience with 3DSecure, Escheatment, Identifee, ERP Solutions
* Azure DevOps boards for Agile/Scrum development. Creating the Epics, Features, and tasks etc.
* Extensive experience in the management of User Request Change and User Conflicts.
* Ability to organize, document and track changes and defects by using Rational Requisite Pro, Clear Quest, Clear Case.
* Expertise in developing Test Plan, Test Conditions, and Test Cases ensuring adequate testing of software both before and after completion conducting and documenting UAT.

# Technical Skills:

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| * + Project Methodologies | * + Rational Unified Process (RUP), Agile – Scrum, Waterfall |
| * + Requirements Management Tools | * + JIRA, Confluence |
| * + Databases | * + MS Access, SQL Server, MySQL, |
| * + Business Modeling Tools | * + MS Visio, Smart Draw, Lucid Charts, Axure, Balsamiq |
| * + Operating Systems | * + Windows XP/7, Windows 10, Mac, Android, iOS |
| * + Reporting | * + Tool Tableau, MS Excel, |
| * + Data cleansing TOOL | * + Google Refine |
| * + Communication Tools | * + MS Outlook, MS teams, Cisco Jabber |

# Areas of Expertise

* + Requirements Analysis and JAD (Joint Application Design) sessions
  + Waterfall and AGILE Software Development Lifecycle (SDLC) methodology
  + Expertise in JIRA and Confluence Project Management tools
  + Strong diagramming proficiency using MS Visio and Lucid Chart
  + Communication platforms such as Zoom, Skype, WebEx, Slack, Microsoft Teams
  + Microsoft Office (Word, Excel, Access, Teams, PowerPoint, Outlook, SharePoint, Visio)
  + User Acceptance Testing (UAT)Unified Modeling Language (UML) and Business Process Modeling (BPM)
* **Certifications & Trainings**
  + Certified Scrum Product Owner - CSPO
  + Scrum Alliance (Jan2019 - Jan2021)
  + Brainstorming trained by Synchrony Financial.
  + Project Management trained by Synchrony Financial.
  + Skills and Transformation trained by Synchrony Financial.

**Professional Experience**

**Travel Port, Englewood, CO Dec 2022 –Tilldate**

**Project Manager**

**Project description:** This multifaceted project focuses on optimizing data utilization and enhancing system integration across various domains within the organization. The key responsibilities span diverse areas, ranging from defining Key Performance Indicators (KPIs) to leveraging advanced analytics tools and fostering collaboration among teams. The project aims to improve decision-making processes, streamline operations, and ensure data accuracy and consistency.

**Responsibilities:**

* Involved in defining the Key Performance Indicators (KPIs') and performed Scope Analysis, Impact assessment, root cause analysis, Effort estimation, Cost-Benefit analysis, SWOT analysis, and Feasibility study.
* Successfully implemented Agile scrum frameworks for software development teams, allowing for increased efficiency and productivity by 30%.
* Facilitated Agile ceremonies such as daily standups, sprint planning, sprint retrospectives, demos, and reviews, to ensure all objectives were met and the project progressed on schedule.
* Collaborated with stakeholders and business sponsors to proactively identify risks and dependencies for Agile projects, reducing the chance for costly delays and errors.
* Developed complex data models in Power BI, optimizing data relationships and creating calculated measures to enhance data analysis capabilities.
* Led and managed the Project Management Office, overseeing project portfolios and ensuring alignment with organizational goals and strategies.
* Established and maintained PMO processes, standards, and methodologies to enhance project management efficiency and effectiveness.
* Gathered, maintained, and prioritized system requests, including bug fixes and enhancements for Veeva CRM and related systems.
* Azure offers scalable resources, allowing businesses to adjust their computing capacity as needed.
* Utilized Python to manipulate and preprocess data for analysis in Power BI. Also, employed DAX expressions to develop insightful calculated measures and advanced calculations, enabling in-depth analysis and actionable insights.
* Integrated Power BI with external data sources, including Excel Spreadsheets and SQL Databases, using Python scripts to provide comprehensive and unified reporting solutions.
* Created design systems and component libraries in Figma to promote design consistency and efficiency across multiple projects, enabling rapid design iterations and maintaining a unified brand experience.
* Strong attention to detail when using VLOOKUP to match and compare data, ensuring accuracy and completeness of analysis, with additional data validation using Python scripts.
* Proven ability to create insightful reports and dashboards to communicate key performance indicators (KPIs) to stakeholders, adhoc analytics, and automated report generation using Python scripts.
* Ensured that projects within the portfolio were aligned with the company's strategic objectives and contributed to its long-term growth and success.
* Performed extensively high and low fidelity prototyping for the application using Mock-Up Screens and Wire Frames, incorporating user feedback through interactive Python prototypes.
* Participated in the development of healthcare data governance processes and procedures to ensure healthcare data quality and consistency across the organization, utilizing data profiling and analysis tools, including Python.
* Collaborated with developers to provide design specifications and assets generated in Figma, ensuring accurate implementation of designs and maintaining design integrity throughout the development process, with version control facilitated by Python scripts.
* Strong analytical skills and attention to detail, with the ability to work independently and prioritize multiple tasks effectively, adhoc analytics, including data preprocessing and analysis using Python.
* Experience in training and coaching others on how to use VLOOKUP and other Excel functions to perform data analysis, with additional guidance on data manipulation using Python.
* Aided in using HiveQL on data to execute data models with MapReduce engine on the clustered data in HADOOP (HDFS), with the possibility of integrating Python for custom MapReduce tasks.
* Created design systems and component libraries in Sketch to promote design consistency and efficiency across multiple projects, enabling rapid design iterations and maintaining a unified brand experience, potentially incorporating Python automation for design tasks.
* Integrated Agile methodologies into the SDLC, fostering a culture of collaboration, flexibility, and rapid response to changing project requirements.
* Facilitated Agile ceremonies, including sprint planning, daily stand-ups, sprint reviews, and retrospectives.
* Assisted in integrating Tableau with Hive with the help of ODBC drivers for the designing, development, and maintenance of critical reporting solutions as per the needs of the business stakeholders, including the use of Python for data transformations.
* Leveraged Figma's collaboration features to facilitate remote teamwork, allowing real-time collaboration, version control, and feedback sharing with team members, regardless of their geographical location, and used Python for web-based collaboration tools.
* Assisted in planning and managing organizational changes related to workflow enhancements, ensuring smooth transitions and user adoption.
* Documented user and functional requirements for a healthcare professional HCP look-up tool between Veeva CRM and the third-party HCP database.
* Created various graphs and dashboards using Tableau for identifying opportunities and spot inefficient processes, with the possibility of enhancing data preparation using Python scripts.
* Proven experience as a business analyst working with Salesforce, a leading customer relationship management (CRM) platform, where additional data analysis capabilities can be added using Python.
* Knowledge of Salesforce products and functionalities, including Sales Cloud, Service Cloud, Marketing Cloud, Community Cloud, and Salesforce Einstein, with potential Python integration for advanced analytics.
* Understanding of business processes and requirements specific to Salesforce, such as lead management, opportunity management, case management, marketing automation, and customer service, with data analysis and automation opportunities using Python.
* Implemented ITIL best practices to enhance service delivery, incident management, and change management processes.
* Established and maintained ITIL processes, including Incident Management, Problem Management, Change Management, and Service Request Management.
* Proficiency in gathering and documenting business requirements for configuring and customizing Salesforce to align with organizational needs and processes, including Python-based automation for data migration and integration.
* Experience in conducting workshops and interviews with stakeholders, including business users, subject matter experts, and technical teams, to elicit requirements and define system specifications, with the potential use of Python for data gathering and analysis.
* Proven experience as a business analyst working with PEGA, a leading low-code platform for building enterprise applications, with potential for Python integration for custom application development.
* Proficiency in gathering business requirements, analyzing processes, and translating them into PEGA application features and functionalities, with the option of using Python for data preprocessing and analysis.
* Understanding of PEGA's business process management (BPM) capabilities, including workflow automation, rule-based decision-making, and case management, with opportunities for Python integration for rule-based automation.
* Experience in conducting workshops and interviews with stakeholders to elicit requirements, define business rules, and map them to PEGA workflows, with potential Python automation for data mapping and rule creation.
* Familiarity with PEGA's user interface development features, such as form builders and UI rules, for designing intuitive and user-friendly interfaces.

**ENVIRONMENT**: Agile-scrum, MS Visio Lucid charts, Power BI, PeopleSoft, Figma, MS Office Suite, JIRA, Confluence, MS SQL Server, adhoc analytics, HP ALM, Tableau, Cucumber , Hadoop HiveQL, Apache Spark,PEGA, SOAP UI.

**JM Family Enterprises, Deerfield Beach, FL May 2022 – Nov 2022**

**Project Manager**

**Project description:**

* This project revolves around optimizing data integration, enhancing system performance, and facilitating efficient communication within the organization. Responsibilities span a wide spectrum of tasks, including the design and development of Integration APIs for swift data retrieval, configuration of big data frameworks like Apache Spark and Hadoop, and utilizing AI-based solutions for supply chain optimization.
* **Responsibilities**:
* Facilitate sprint planning, daily stand-up meetings, sprint reviews and retrospectives.
* Support the Product Owner in their responsibilities, including backlog refinement, sprint planning and managing stakeholder expectations.
* Coach development teams to optimize their use of Agile/Scrum practices and ensure team members effectively use Scrum principles.
* Evaluated project risks and dependencies within the portfolio, identifying potential bottlenecks, resource constraints, and mitigation strategies.
* Maintained detailed documentation of workflow plans, process maps, and improvement strategies for reference and compliance purposes.
* Azure provides various cost management tools and features to help businesses control and optimize their cloud spending.
* Continuously learning and staying up-to-date with the latest tools, technologies, and trends in Azure DevOps, including practices relevant to Wall Street software development optimization for maximum efficiency and effectiveness.
* Continuously learning and staying up-to-date with the latest tools, technologies, and trends in UAT preparation and execution, ensuring that UAT practices are optimized for maximum efficiency and effectiveness.
* Conducted regular ITSM process reviews, identifying areas for improvement and implementing changes to enhance efficiency and service quality.
* Utilized ITSM metrics and key performance indicators (KPIs) to measure and report on service delivery effectivenes
* Experience in running Apache Hadoop streaming jobs to process large amounts of XML format data and exporting analyzed data to relational databases using Sqoop, particularly for Wall Street data analysis.
* Tyler provides various tools for Wall Street data extraction, such as query builder and report writer. Knowing how to use these tools can help you extract relevant Wall Street data from the system for analysis.
* Tyler data can be complex and often requires cleaning before analysis. Knowing how to clean and preprocess data can help you ensure the accuracy of your Wall Street data analysis.
* Collaborated with IT teams to implement integrations between Adobe solutions and OEM systems, ensuring data synchronization, seamless customer experiences, and efficient data flow for sales and marketing.
* Helped the Product owner in finalizing the Minimum viable product (MVP) and maintaining the Product Backlog and the Sprint Backlog by assisting the Product owner in prioritization and estimation of Product Backlog Items
* Assisted the Scrum Master to maintain the Sprint/ Release Burn-up and Burn-Down charts, Velocity Chart in JIRA, with a focus on Wall Street project management.
* Managed sprints artifacts i.e. burndown charts, project velocity, sprint backlogs, and product backlogs using JIRA, managed and shared these artifacts using Confluence tool.
* Performed data integration and data mapping management along with data cleansing while migrating data from legacy systems to Guidewire Policy Center.
* Spearheaded the adoption of DevOps practices to streamline collaboration between development and operations teams.
* Implemented CI/CD pipelines, enabling automated testing, deployment, and continuous integration to improve software delivery speed and reliability.
* Actively involved in product release and deployment phase to end-users after development and testing of the product and assisted the team in preparing training material for Underwriters, agents, and Claims staff
* Familiarity with Salesforce configuration options, including custom objects, fields, validation rules, workflows, approval processes, and security settings.
* Expertise in creating and maintaining reports, dashboards, and data analytics within Salesforce to provide insights and support decision-making.
* Conducted training sessions for team members to enhance their understanding of ITSM and SDLC methodologies.
* Azure offers a wide range of data analytics services, such as Azure Data Lake and Azure Synapse Analytics, enabling BA professionals to gather insights from large datasets
* Understanding of Salesforce data model, data relationships, and data management best practices to ensure data integrity and quality.
* Implemented and maintained metrics and reporting mechanisms to track the progress and performance of SDLC and ITSM processes.
* Proficient in conducting user acceptance testing and supporting end users during Salesforce implementations, upgrades, and enhancements.
* **ENVIRONMENT**: Agile-Scrum, Guide Wire Data Hub, MS Visio, SQL, MS Excel, MS PowerPoint, MS Office Suite, JIRA, salesforce,JENKINS, MS-SharePoint, MS SQL Server,PEGA, Oracle, R-Studio, , Apache Spark, HDFS, Hive, Sqoop, Java, Excel.

**Synchrony Financial, Stamford, CT May 2018 - January 2022**

**Project Manager  
PROJECT 3  
Responsibilities:**

* Act as a liaison between the Business owners, stakeholders, and IT AGILE team on large and/or complex technical projects, including those involving Calypso integration.
* Implemented technical solutions to support accounts receivable and billing functions, decrease system down time, and mitigate loss of customers. Met rigorous system integrity requirements and complied with credit card transaction processing requirements.
* Leading teams in implementing and lean project/product delivery, with a focus on Calypso solutions when relevant.
* Responsible for facilitating Joint Application Design (JAD) and brainstorming sessions with the respective team members and Subject Matter Experts (SMEs), especially when Calypso is part of the discussion.
* Responsible for developing the business requirements in Workstation for call centers, collections, and back office, supporting future functionality needs, platform integration, prioritization of projects, and developing Calypso-related solutions.
* Handled and supported product expansion and growth of the Automation Anywhere/ RPA platform within Enterprise Operations, including integration with Calypso where applicable.
* Established key performance indicators (KPIs) to measure workflow effectiveness and track progress towards optimization goals.
* Collaborated with stakeholders to allocate resources efficiently across multiple projects, balancing project priorities and optimizingresource utilization.
* Azure includes robust machine learning and artificial intelligence services (Azure Machine Learning) that support predictive analytics and automation.
* Focused on Continuous Integration, Continuous Deployment (CI/CD), including Calypso-related processes when required.
* Well-versed in coordinating software development life cycle (SDLC) projects with co-located, distributed, and offshore teams, including those involving Calypso systems.
* Used Agile best practices like – timeboxing, user stories, daily stand-ups, frequent demos, test-driven development, retrospective & continuous integration, adapting them as needed for Calypso projects.
* Directly responsible for designing and implementing solutions for the servicing platform, developing business requirements/user stories, user interface design, and overseeing end user testing, particularly when Calypso is involved.
* Manage risks, issues & changes throughout the project.
* Participate in cross-functional work sessions with both the business and IT customers to capture stakeholder needs and requirements.
* Develop and create business requirements (BRD), functional requirements (FRD), and non-functional requirements documentation.
* Build and develop Requirements Traceability Matrix (RTM), Gap analysis issues, and other tracking tools.
* Advocated for continuous improvement by regularly assessing workflow performance and identifying opportunities for refinement.
* Use MS Visio and Lucid Chart to develop process flows and diagrams to provide stakeholders with a visual representation of the system functions.
* Developed and implemented prioritization frameworks such as the MoSCoW method, cost-benefit analysis, and the Eisenhower Matrix to rank and prioritize projects within the portfolio.
* Provide client support and post-implementation monitoring after product release, especially when Calypso solutions are involved.
* Prepare project charter, tailor detailed project plans & schedules, review scope of work (SOW), and define tools & techniques that help achieve the project objectives.
* Demonstrated advanced proficiency in the Google Suite of applications, including Gmail, Google Docs, Sheets, Slides, and Drive.
* Leveraged collaborative features to enhance team productivity and streamline document sharing and editing processe
* Use JIRA to create user stories, acceptance criteria, assign tasks, and estimate story points for the team.
* Work with Product Owners to manage and prioritize the epics, user stories, and acceptance criteria in the backlog.
* Assist with Quality Assurance activities by conducting User Acceptance Testing (UAT), defect reporting, and ensuring properresolution of issues.
* Experience in Competitive Analysis, Gap Analysis, and understanding of ROI Analysis, P&L Analysis, SWOT Analysis, Impact Analysis, and Cost-Benefit Analysis.
* Conducted detailed financial analysis to evaluate potential CAPEX projects, including ROI (Return on Investment), NPV (Net Present Value), IRR (Internal Rate of Return), and payback period calculations.
* Provide ongoing guidance and direction to the project team, manage the project scope and change requests.
* Developed reporting and monitoring processes to demonstrate compliance.
* Identified, owned, and drove issues to resolution.
* Worked on opportunities to adopt agile processes earlier than scheduled and adhered to Agile Methodologies throughout the entirsoftware development process.
* Managed requirements from Global Business & Risk Management users.
* Elicitation techniques like interviewing, questionnaires, brainstorming, focus groups, prototyping, and facilitating JAD sessions.
* Worked with Confidential cross-functional team of Business Development.
* Responsible for various deliverables throughout the software development lifecycle from process flow diagrams to mock-ups and wireframes.
* Responsible for providing regular test reports to the management
* Performed different levels of quality checks and performed UAT Sessions as required.
* Analyzed business needs and worked with technical and non-technical teams to overcome challenges, worked with business users, stakeholders, and SMEs, including those related to Calypso implementations.
* Collaborated with finance and accounting teams to develop CAPEX budgets, ensuring that planned expenditures were aligned with the organization's financial goals and constraints.
* Managing appropriate levels of Business and IT involvement at all phases of User Acceptance / QA Testing, including those related to Calypso testing.
* Timely, clear communication with Business and IT groups on testing progress and go-live readiness, including those specific to Calypso projects.

**Synchrony Financial, Stamford, CT July 2016 – April 2018**

**Associate Project Manager  
PROJECT 2**

**Responsibilities:**

* Lead and managed full UAT cycle for the bank for multiple projects across different platforms including Business, Web, and Mobile Testing Projects.
* Participated in project management, design, requirements definition, specification, budgeting, control, and structuring of Mortgage processing system.
* Developed system concept, interviewed business SMEs to gather, analyzed and managed requirements.
* Utilized RUP methodology to create Process Flow, System Flow.
* Extensively involved in project documentation, including Software Requirement Specification SRS, Use Cases, User Interface Specification, Report Specifications, Letter Specifications, etc.
* Worked on opportunities to adopt agile processes earlier than scheduled and Adhere to Agile Methodologies throughout the entire software development process.
* Identified and assessed financial risks associated with CAPEX projects, developing risk mitigation strategies and contingency plans to minimize potential financial setbacks.
* Azure provides extensive security and compliance features to protect data and meet regulatory requirements, which is crucial for business analysts handling sensitive information.
* Worked on Agile SDLC methodology and assigned tasks among development team monitored and tracked progress of project.
* Researched and analyzed business needs and ways to improve property and casualty, specifically policy contracts and processes administration.
* Facilitated and managed meeting sessions with committee of SMEs from various business areas including Mortgage Servicing, Loan Monitoring Loan Origination to Loan Processing and Asset Management.
* Working with internal, external, and vendor development teams involving globally.
* Hands-on Experience on HP ALM/QC and Agile.
* Leading the online Banking testing platform for core Banking (online).
* Worked on Agile methodology and have worked closely with the PO and Scrum master on Agile projects.
* Worked on complete end-to-end SDLC projects in Agile and Waterfall.
* Leading the UAT for business, web, and mobile-related projects.
* • Developed expertise in digital banking platform involving over multiple Applications.

**Synchrony Financial, Hyderabad, India April 2014 – June 2016**

**Associate Project Manager  
PROJECT 1  
Responsibilities:**

* Application of Simulation to understand the current system and identify problematic areas.
* Used Simulation to verify the impact of Variability on the system and identified different levels of improvement.
* Planned activities for the Analyst group and provide estimates for Analyst activities.
* Worked in developing the wireframe and mock-ups for the prototype of the web-based portal application in MS Visio.
* Created Process blueprints for Cost and Time estimates for migrating existing Savion Business Process Applications to IBM BPM.
* Create mapping documents for ETL implementation; Create mapping documents from data source to Teradata target tables.
* Maintain regular interaction with the actors of the supported business line on the full scope of the relationships.
* Worked with project stakeholders to create comprehensive business cases for CAPEX initiatives, outlining project objectives, expected benefits, and financial justifications.
* Azure DevOps services help in automating the software development lifecycle, streamlining collaboration between developers and BAs.
* Participated in SCRUMS and discussed the open issues and statuses related to Project.
* Has experience in Software Testing Life Cycle in domains like Debit Card Management system, Debit Card Reconciliation system.
* Dealt with Processes, governance, policies, standards, and tools as part of MDM to consistently define and manage critical data of the organization.
* Azure offers cost management tools and features to help businesses control and optimize cloud spending.
* Manipulate advanced Excel spreadsheets and data using intermediate to advance skill levels, especially in financial modeling for project analysis.
* Excellent skill in creating Unified Modeling Language (UML) standard diagrams, including Use Cases, Activity Diagrams, Data flow diagrams.
* Good experience in Capital Markets/Trading and Equities, T-Bills/Bonds, Public and Corporate Debt, Fixed Income, and Derivatives.
* Identified and assessed new and existing risk and elevated any concerns to capital market senior Management to mitigate bank exposure or potential loss.
* Led process improvement projects within capital markets and ensured timely and accurate results of all projects.

**Education:**

* Bachelor of Technology from Jawaharlal Nehru Technological University Hyderabad, India (2015)