

JEREMY ZAGHDOUN

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BUSINESS ANALYST | BUSINESS ARCHITECTURE ADVISOR | PRODUCT OWNER

PROFESSIONAL PROFILE

Digital transformation expert with over 20 years of experience in banking, insurance, and wealth management sectors. Recognized specialist in designing complex business solutions, combining deep expertise in financial products with mastery of agile methodologies and user experience. Demonstrated ability to intervene in major strategic transformation programs, from needs analysis to delivery of innovative solutions generating measurable value.

KEY EXPERTISES

- Business Architecture & Transformation Consulting: Value stream diagnosis and mapping, strategic business solution design, technology platform modernization
- Financial Product Management: Group retirement savings, mutual funds, balance sheet products, investment product manufacturing
- Agile Leadership & Product Ownership: Certified Product Owner (PSPO I), SAFe PO/PM, Scrum team leadership, backlog management
- User Experience Excellence: UX Master Certificate (Nielsen Norman Group), customer journey design, prototyping, usability testing

KEY ACHIEVEMENTS

- Strategic Innovation Program at National Bank: Analysis and structuring of major innovation programs, mapping of complex processes, facilitation of bilingual strategic workshops, agile coordination with all innovation lab teams
- Product Manufacturing Transformation at Desjardins: Complete value stream diagnosis for mutual funds, ETFs and term savings, identification of at-risk capabilities, proposal of strategic initiatives generating significant efficiency gains
- Large-Scale Technology Migration (FMS to Unitrax): Leadership of complete migration including testing strategies, technical coordination, process documentation, operational risk reduction
- Training of 100+ Wealth Management Professionals: Design and delivery of 'Wealth Management 101' program covering financial system actors, regulation, instruments and asset classes

PROFESSIONAL EXPERIENCE

Roni Conseil (Incorporated) | 2025 - Present

Digital Solutions Consultant – Banking, Finance, Insurance

National Bank (via We+) | 2025 - Present

Business Analyst - Innovation Lab

- Leadership of strategic innovation programs: Full ownership of complex innovation programs, in-depth analysis of strategic objectives, identification of technological and business challenges
- Business process analysis and optimization: Detailed mapping of current and target business processes, identification of inefficiencies and improvement opportunities
- Strategic workshop facilitation: Bilingual (French/English) workshop facilitation with senior stakeholders, collection and synthesis of complex requirements

CGI (Desjardins GPAP) | 2018-2025

Expert Consulting Director

Business Architecture Advisor - GPAP Transformation Program

- Strategic diagnosis of product manufacturing value streams (term savings, wealth products, mutual funds)
- Complete mapping of at-risk capabilities and recommendations for priority initiatives

Trainer - Wealth Management 101

- Training of 100+ professionals in wealth management fundamentals since 2022

Business Analyst - Strategic Projects

- FMS to Unitrax migration: testing strategies, technical and functional coordination

Allianz France | 2014-2018

Product Owner & Project Manager

- Digital roadmap management: user stories, journey design, prototyping
- Deployment of iOS applications to 2,000 agents, Agile product lifecycle management

ING Direct | 2011-2013

Business Analyst & Project Manager

- Mobile solutions roadmap for iOS and Android: detailed functional specifications

Generali France | 2008-2011

Business Analyst

- Web and mobile program: workshop facilitation, functional specification writing

BNP Paribas Insurance | 2003-2008

Business Analyst

- Mortality table - Pension service: multi-business requirements gathering, business process mapping

EDUCATION

- Financial Planning Certificate (Pl.Fin.) - HEC Montreal (in progress - completed 2027)
- Diploma UX Design - UX Design Institute (2020)
- Master's in Market Finance & Wealth Management - CNAM, Paris (2008)
- Management Director Title - European Business School, Paris (2002)

PROFESSIONAL CERTIFICATIONS

UX Master Certificate - Nielsen Norman Group (2021) | SAFe PO/PM - Scaled Agile (2019) | PSPO I (2019) | UX-PM (2017) | PMP (2013)

TOOLS & ENVIRONMENTS

Financial Products: Unitrax, Global+, record keeping | Methodologies: Agile Scrum, SAFe, Design Thinking, Lean | Management: JIRA, MS Project, Visio | UX: Axure, Balsamiq, Figma | Technologies: REST/SOAP, iOS, Android, ServiceNow

Languages: French (native), English (professional), Spanish (conversational)