

Charles Schwab & TD Ameritrade

[May'16 – Oct'21]

Procurement Operations & Analytics: Sr. Manager < Manager < Sr. Analyst

- Acted as a Chief of Staff, responsible for reporting, strategy, and PMing improvement initiatives.
 - Established team KPIs, automated recurring reporting, and built analytics dashboards for ongoing monitoring. Ad Hoc reporting for integrations, regulators, Congress, Supplier Diversity.
 - Project Manager:
 - Planned and implemented alternate sourcing channels (P-Card, Preferred Vendors, PO-Only) for ~10% of purchases and 1% of spend (~\$17M) to free time for Strategic Sourcing.
 - Established backlog, risks, etc. for in-flight Schwab data migration to help meet go-live targets, then designed method for automating Schwab's procurement reporting.
 - Business-partner handoffs, Lean process mapping, Engagement Survey responses.
 - Strategic: Org Chart (CCOE, Buy Desk), Contract Obligations, Blockchain Research, SM Updates.
 - FY18 Equity Award winner. Developed SQL tutorial for team training. Finance Culture Team.
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Practice Makes Perfect

[Oct'15 – Apr'16]

Operations Consultant

- Ops: Implemented Lean practices by creating value stream maps (VSM), metrics, and targets for every role. Tied performance reviews to metrics, and started meeting rhythms (ie. daily huddles).
 - HR: Hired 5 new employees, wrote all formal policies, began quarterly 1-on-1 HR & VSM reviews, switched insurance and payroll providers, and led 401(k) enrollments.
 - Other: Developed a jobs/task board to solve for lack of upward mobility. Managed 3 employees.
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TD Ameritrade

[Jun'13 – Sep'15]

- Analyst II - Portfolio Management: T2 Spot Award. Built SQL schema and automated existing reports.
 - Analyst - Retail Strategy: President's Club Award. Retention strategy for TDA education platform.
 - Analyst - Lean CoE: Time-management strategy led to ~5% increase in Client Facing Time.
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EDUCATION: Cornell University
BA for Political Science
Sprint Football, Student-Athlete Advisory Committee, Delta Upsilon (Treasurer)

SKILLS: SQL, Tableau, Lean Six Sigma, Data Analysis, Python, Project Management, Agile, Analytics, Operations, Business Strategy, React

CERTIFICATIONS:
PMP (PMI)
Six-Sigma Green Belt
AWS Cloud Practitioner

VOLUNTEER EXPERIENCE

Social Tees Animal Rescue (2019-20): Fostered 10 dogs.

Bowery Residents' Committee (2018): Homeless outreach at Penn Station, 4 hours weekly for 3 months.

Practice Makes Perfect (2013): PM for PMP's first fundraiser. 3 volunteer teams raised ~\$40k on ~\$10k budget.

OTHER LINKS:

Github: <https://github.com/jjward25?tab=repositories>
Medium: <https://medium.com/cultural-commentary>
Bracket Game: <https://www.topictournaments.com/>

HOBBIES:

Reading, Basketball, Coding, Adventure Travel, Poker, Hiking, Snowboarding
