

# KEVIN REILLY

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## PROFESSIONAL BACKGROUND

Kevin brings 13 years of experience, including 7 years of technology consulting experience, focusing on helping clients develop and implement their strategic plans and operational objectives. He is a meticulous, results-driven consultant who drives execution where everyone feels they have a seat at the table. Kevin takes pride in being able to react to reality versus original vision and course-correct where necessary, while ensuring stakeholders are updated and aware of progress, results and likely outcome (qualitatively and quantitatively).

With experience streamlining finance, strategy and operations functions for large, complex clients with domestic and international presence, Kevin is accustomed to synthesizing information for numerous key stakeholders. Kevin utilizes business process optimization skills to identify gaps and needs, integrating technology solutions when possible. His experience ranges from assisting clients in technology vendor selections, target operating model buildouts, large technology system implementations & transformations, project management, process improvement and coordination of system integration.

## SELECTION OF RELEVANT EXPERIENCE

### Project Manager/Scrum Master/QA Lead – Multiple Initiatives for Fortune 500 company

After successful delivery of his originally assigned project, Kevin's stakeholder at a Fortune 500 company requested for him to lead additional initiatives that led to a 3-year relationship. He wore a few hats within the Enterprise Data Solutions group including Project Manager, Scrum Master & QA Testing lead. The various initiatives for the group, that all required cross-functional effort across multiple teams, included launching products, data warehouse migrations, product feature enhancements and sales campaigns. Most recently, he led the launch of an MVP Business Intelligence tool for the Fortune 500's company high priority Capital Market's client. He wore multiple hats for this initiative including Project Manager, Scrum Master for 2 of the teams engaged & QA lead for UX/UI Functional & Data Validation testing.

### Implementation Lead – Design, Deployment, UAT & Training of Accounting module, CRM & Investor Portal

Kevin led the implementation of a suite of technology tools including an Accounting module, CRM system & Investor Portal for \$48B AUM Private Equity Manager. Prior to Kevin and team walking in the door, the client had stressful experiences in previous implementations and needed a trusted partner to not only deliver, but also guide all stakeholders along the journey in an organized fashion. His responsibilities ranged from leading requirements gathering sessions, to project and vendor management, targeted conceptual design workshops & training. Throughout the project, Kevin updated stakeholders on progress, documented business decisions and identified timeline risks and issues. He ensured the client was aware of leading practices for process design. Kevin led targeted conceptual design workshops and performed business analysis in preparation for data and documents migration (~600k documents). He also produced end-to-end process documentation & UAT scripts for training & UAT sessions, and spearheaded the post go-live support. As a result, the implementation was delivered on-time with quality assurance, leaving the client feeling comfortable and confident. The client received positive feedback from their investors on their user experience with the new platforms.

### Industry Experience

- Financial Services
- Alternative Investments
- Capital Markets
- Merchant Services
- IT Services

### Functional Expertise

- Requirements Gathering & Analysis
- Project Management
- Stakeholder & Vendor Management
- Data Analysis & Migration
- Validation & Testing
- Change Management & Training

### Certifications

- Certified SAFe Scrum Master
- Previously held Series 7 license & Series 63 license



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## SELECTION OF RELEVANT EXPERIENCE

### Vendor Selection Lead for Various Technology Solutions

Kevin supported key business and technology stakeholders in identifying the best technology-fit solution in the following areas: Partnership Accounting, Contact Management and Web-Based Investor Reporting Portal. He developed the Request for Proposal (RFP) and ensured that all Client requirements, including functional, business and technical necessities, were captured. He acted as the liaison between the vendors and stakeholders at the firm, making sure to manage any questions from either party regarding the RFP. Kevin delivered detailed response summaries from each vendor for stakeholders and ensured both parties were aligned. He facilitated proof of concept (POC) demonstrations with each of the 4 vendor platforms. Kevin also created scorecards for the vendor POC. For the final deliverable to help stakeholders (including the CFO) decide, he produced an Executive Summary. As a result, the client was positioned to make an informed decision on vendor selection.

### Implementation Lead – Data Structure Design & Migration

Kevin help lead the implementation of Partnership Accounting system for \$15B AUM alternative investment manager. Prior to the implementation, the client performed most of their accounting processes manually in Excel. This process had left inconsistent data and limited the team's ability to provide straight-through processing reporting. Kevin identified the need for a technology solution and led the 18-month project. His role ranged from project management, documentation of requirements for target state design, to production of reports and historical data conversion. He also delivered all referential data through CRM (300+ Deals, 200+ Chart of Accounts, 600+ Investment Positions, 800+ Investors, 150+ Vehicles, etc.). Kevin also built the target state governance model and directed training (user guides, process flows, etc.) for stakeholders in the US, Luxembourg and Singapore. Kevin led the team across the finish line with a smooth transition to go-live. As a result, the client now has straight-through reporting capabilities for their accounting books and records.

### Current State Assessment Co-Lead

A global Asset Manager's COO wanted to understand how the firm's growth plans would impact its current operational platform as AUM and operational complexity were expected to grow significantly. Kevin & team delivered a current state assessment for the asset manager. Kevin conducted targeted interviews with accounting, business development / investor relations and tax functional teams identifying operational & process pain points. As a result, Kevin mapped key process flows, evaluated operational capabilities, and identified people, process, data, and technology focused improvement opportunities. As a final deliverable, Kevin & team created a detailed implementation roadmap for operational growth initiatives as well as project charters.

### Business Analyst – Data Migration, System Configuration, UAT & Training

The COO of an Asset Manager was looking to centralize and improve efficiency of its cash management and reporting capabilities and had chosen to implement Reval TMS. Kevin led the implementation of this treasury & risk management system. His responsibilities included all core bank connectivity and integration with Reval, core data migration with upstream and downstream systems, configuration of push-button payment templates (~2k routine payments prepared in minutes instead of hours in prior state), vendor management, UAT scripts, leading training and post-go live support for stakeholders in the US, Ireland and Luxembourg. The client was pleased with the new treasury management system and its successful implementation. It had not only satisfied the client's primary objective of obtaining a dynamic reporting tool, but it provided the technology that could be leveraged as a centralized cash hub – handling all aspects of bank connectivity, cash processing, forecast and position reporting and risk management tracking, trade management and settlement.

### Technology Expertise

- Microsoft PowerPoint
- Project
- Visio
- Salesforce & other CRM solutions
- WebFocus & other Business Intelligence Tools
- SaaS & PaaS

### Methodologies

- Agile Software Development
- Business Process Improvement
- Business Analysis
- Change Management
- Project Management
- Requirements Gathering
- Situational Leadership

### Deliverables

- Executive Summaries to C-Suite personnel
- Change Management & Training Strategy Plans
- Request for Proposal (RFP)
- UAT Scripts
- Conceptual Design Documentation
- IT Project Planning and Scheduling
- Technical Implementation Plans

