ZACHARY A. DAVIS

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PROFESSIONAL BACKGROUND

Zach has broad experience leading an array of technology, product and operations initiatives. He is comfortable in various roles including Business Analyst, Product Owner, Scrum Master and Project Manager. He has considerable experience with process mapping/improvement and leading change objectives. Zach has successfully delivered various types of products, systems, websites and mobile applications across various insurance and payment processing companies. He's demonstrated effective management of many deliverables, capital funding, complex dependencies/risks, resourcing and reporting. He also has a deep background in gathering and communicating both high level and technical requirements for multiple teams and initiatives. He has effective communication experience between technical and non-technical groups of stakeholders. Through Zach's leadership, influence and other skills, he creates open communication and maintains effective relationships within project teams and various stakeholders. He is highly adaptable, comfortable in uncomfortable situations and a champion of forward change.

SELECTION OF RELEVANT EXPERIENCE

Program Manager

Zach joined a product group at a Fortune 200 company to identify programs and the path forward to properly relaunch and commercialize a security product. He was able to jump start projects and development train work that had been stalled for months holding up $70 million in revenue. He identified and delivered the steps needed to properly commercialize and improve compliance controls for the product. Zach provided staff addition, revenue and product life cycle business cases for growth opportunities and product end of life. He also successfully implemented program/project tracking for dependencies, scope, risks, delivery dates and prioritization across 10+ other product groups, which allowed for identification of resource demand and visibility for stakeholders. Zach led a separate product team process/operational scaling analysis effort to support future growth by designing a request intake/workflow process in Smartsheet to streamline reporting and communication between the working teams and senior management. He additionally led efforts to analyze, improve, estimate and prioritize product BAU tasks as well as eliminate low value efforts.

Project Lead

Zach was brought in to lead multiple struggling for a Fortune 500 Property and Causality Insurance Company. He built confidence and great rapport with many stakeholders from heads of the business units to downstream reporting teams. He identified critical paths, requirements, dependencies and actionable goal/task breakdowns to deliver key features for product implementations/integrations and system improvements. Additionally, Zach greatly improved agile team performance through coaching and demonstration of effective scrum ceremonies and positive team interactions. The increase in team performance led to a higher velocity of completed tasks and quicker resolution of issues as they arose. Through effective communication, he was able to restore stakeholder's confidence in the delivery team and allow for increasingly productive feedback from both groups. Zach also documented processes and systems related to the projects to build knowledge capital for the team. Through this documentation, he provided feedback for his client's on-boarding process to reduce in-person training hours for future team members.

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Industry Experience

- IT Services
- Financial Services
- TPA Services
- P&C and Life Insurance
- Individual & Group Annuities
- Non-Profit Land Mgt.
- Payment Processing

Functional Expertise

- Business Analysis
- Product Owner
- Process Improvement
- Agile Coaching
- Training Development
- Product Management
- Program Management
- Project Management

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SELECTION OF RELEVANT EXPERIENCE

Business/Systems Analyst

Zach was brought in to do Gap analysis and detail requirements for a large Individual Annuity system conversion for a Fortune 500 Third Party Administrator. He delivered Business and Solution requirements while also detailing high level test scenarios for an Annuity Administration system conversion. Through detailed product Specifications review, Zach performed Gap Analysis between the two Annuity Administration systems. He effectively led requirement refinement meetings with the project team to deliver actionable system solutions for the client that considered restrictions from regulation and product contract provisions. Zach's leadership and applied expertise in requirement refinement helped to deliver project ahead of schedule with decreased compliance risk.

Project Lead/UX Analyst

Zach was assigned to takeover a project where a new website was partially built for a Financial Services company, but resources had been lost to complete the project. Zach was able to quickly interview users and provide direction for the reconstructed project team, recommendations for an improved website User Experience and a high-level test strategy. Zach's reporting and analysis helped orient the PM backfill on the project situation. His user experience recommendation report helped direct various stakeholders in terminology simplification, more intuitive page layouts and consistent information grouping. Zach's high-level test strategy helped Quality Assurance resources focus on high impact scenarios, in addition to clarifying testing needs for more complicated test cases.

Project Lead/Business Analyst

Zach led multiple IT project teams to deliver Individual Annuity products, and modifications needed for the Administration and reporting of over $2 billion in annual annuity sales. Zach determined a high-level approach to requirements gathering, stakeholder reporting and the documentation method to best utilize the team's skills to maximize the success of the project. He coordinated requirement reviews for product launches with senior leadership, marketing teams and development stakeholders, to assure requirements were accurately documented and tracked. Zach provided precise and detailed system cases, while working with development to assist in design of transaction processing and table structure that would assure transaction order of processing, benefit calculations and other various calculations would be accurate. Zach performed and oversaw highly detailed test result walkthroughs to assure Business Stakeholders that all critical elements were tested properly. Zach delivered both requirements and quality assurance phases over the six-month project on time, with stakeholder satisfaction and without any significant production bugs.

Business Operations Supervisor

Zach played a key role as a stakeholder and change leader in a multi-year project to implement a new record keeping system and business process for a Retirement Plans operations department. He handled the change management messaging, training and department support to transition to the new system and department processes. Zach designed and documented all workflows for the department. He documented procedures and system functionality in both business and solution requirement formats to increase the success of change management messaging. Zach operated on the scrum project team as a subject matter expert. He drove the user experience development for the successful implementation of a new web portal for agents and customers. Zach also took the opportunity to improve his Customer Service team's processes by greatly increasing the efficiency of asset conversion processes, which contributed to meeting the department's sales goal over $200 million in assets received and converted.

Technology Expertise

- Smartsheets
- Jira
- Rally
- Pivotal Tracker
- Oracle/SQL
- XML/CXML/ACORD
- JSON

Methodologies

- Agile Software Development
- Kanban
- Scrum
- SAFe
- Waterfall

Certifications

- Certified SAFe® 5 Agilist
- Essential Skills for Managing Projects
- Certified Tester, Advanced Level Test Analyst (CTAL-TA)