

Lewis Turner

CONTACT DETAILS

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PROFILE

An enthusiastic, self motivated Financial Services Industry experienced IT practitioner, with a passion for developing and implementing effective technology solutions to support continuous improvement in organisational capability.

KEY ACHIEVEMENTS

SYSTEMS DEVELOPMENT

- Over the last 18 months I have used online resources to teach myself web development programming (HTML5, CSS3, JavaScript and Python) and have been given the opportunity to put those skills into practice during a major ongoing project to redesign the in house system; making it more user friendly with a modernised framework as well as mobile and tablet compatible.
- Designed and developed 'Virtual PA', a system that analyses existing customer data, in order to identify potential advice opportunities; with a view to offering customers holistic advice.
- Implemented a 'key performance indicator' reporting and monitoring solution, designed to identify such things as advice quality, complaints, persistency and TCF measures; with the overall goal of producing a 'quality based pricing model' for appointed representatives.
- Developed a multiple pension scheme calculation and administration application, based on stated business requirements; to replace manual spreadsheet based calculators. Incorporating a Visual Basic.net front end, Microsoft SQL database and Crystal reports for reporting.
- Designed and implemented auto-population of templates from 1st Software Adviser Office for efficient production of client specific, asset analysis reports for Client Investment Reviews.
- Integration of progressive telephone dialler into existing communications and back office database systems to support effective lead and client contact management systems.

PROJECT MANAGEMENT AND ANALYSIS

- Member of the main programme group and the IT project manager tasked with the complete overhaul of the existing mortgage advice process; in order to make the process as streamlined as possible. The end solution resulted in:
 - automated ID and Credit Checking
 - a dynamically generated electronic fact find focused on developing holistic advice practices
 - integration with the Twenty7Tec's MortgageSource, LoanSource and CombinedSource products for a fully MCD compliant sourcing system
 - a dynamically generated suitability letter wizard aimed at significantly reducing the time required to create a suitability report.
- Analysis and improvement of the existing automated income reconcile and verification process. Improving on such things as file completeness and own life checks and implementation of a full introducer payaway process.
- Business analyst on the project team for both the retail distribution review (RDR) and mortgage market review (MMR) implementation. This resulted in a technology driven, compliant process; making the adviser journey and reporting requirements as streamlined as possible.

- Project Managed the implementation of an automated Financial and Proprietary auditing solution. Subsequently used by the business to meet regulatory requirements for many hundreds of appointed representatives.

DATA MANAGEMENT

- Produced a full suite of reports for the quarterly FCA RMAR (retail mediation activities return); reducing the time taken to complete the return from approximately 35 to 3 hours. Also, routinely complete ad-hoc data requests for the FCA.
- Development of a Crystal Report designed to isolate and report matches between group databases and HMRC supplied data in relation to Money Laundering Risk Management.
- Development of tools for Auto extraction of Management Information from databases.
- Integration of The Exchange (now IRIS) application tracking module to bespoke internal CRM package for automated pipeline application progress monitoring.

IT INFRASTRUCTURE

- Supported project management and installation of a full, multi site server refresh and new telephone system, including integration of “call popping” technology.
- Planning and testing of effectiveness of Business Continuity Strategy, making recommendations for improvement in Disaster Recovery capability.
- Data Security. Review of existing IT and Communication Systems against identified risks. Design, testing and implementation of agreed technical changes and policies to provide appropriate mitigation.

KEY SKILLS

Technical Knowledge

- HTML5, CSS3, JavaScript, Python
- Microsoft SQL, MySQL, SAP Crystal Reports
- Microsoft Visual Basic.Net
- IT Applications – Microsoft Office, VBA
- Windows Operating Systems, MacOS, iOS
- Knowledge of IT Networks, systems and databases, CCNA level 1.

Competencies

- Project Management skills (familiarity with PRINCE2 and working knowledge of AGILE principles), capable of quickly adapting to changing environments
- Problem solving, persistent and determined, strong initiative, judgement and decision making skills.
- Communication, working with staff at all levels and with external agencies, ability to simplify IT concepts and explain to others. Strong teamworking skills.
- Diagnostic skills incorporating logic and intuition, analysing and interpreting data, critical reasoning
- Planning and organising, accuracy and attention to detail, working to deadlines
- Corporate focus, objective driven and action orientated.

EMPLOYMENT HISTORY

Personal Touch Financial Services, Trinity 3, Trinity Park, Solihull, B37 7ES

Senior Business Analyst

June 2012 - Present

This role gave me the opportunity to build on my IT background and develop my project management skills. I have also been given the opportunity to put my self taught skills in web development into practice on the businesses main technology platform; which is used by over 100 internal business users and around 500 external appointed representatives.

- Specify, develop and test system changes, create MI reports and provide 3rd line user support.
- Prioritise and plan work for a team of Business Analysts; including resource distribution and monitoring, in line with the strategic business plan as defined by the board and head of IT.
- Optimise existing department procedures.

Torquil Clark (Holdings) Ltd, St Marks, Chapel Ash, Wolverhampton, WV3 0TZ

Technical Development Coordinator

June 2007 – June 2012

This role started as a temporary summer contract. I was made permanent in 2008 and progressed from 1st line IT Support, infrastructure maintenance, finally through to a development based role.

- Design, development and implementation of streamlined technology solutions to meet business needs.
- Integration of external IT products and software solutions
- Delivery of IT Services throughout the Group, both local and remotely.
- Support in the delivery and maintenance of general housekeeping, monitoring systems and audit trails.

Focus DIY, Coppice Lane, Aldridge, Walsall.

Customer Service Advisor

August 2005 – July 2007

Part time employment during A Level studies.

EDUCATION

Shelfield Sports and Community College

September 2000 – June 2007

A Levels

IT

Product Design

Music Technology

Psychology

General Studies

Citizenship

GCSE's

English Literature

English Language

Maths

Science (Double Award)

Graphic Design

Music

Physical Education

GNVQ

IT

INTERESTS

At the age of 10 I taught myself to play guitar. I have achieved a high standard of multiple styles of music. I played in a band for a number of years during which time we were involved in several festivals and charity performances. I am also a keep climber. I have achieved a good level of proficiency at both the “lead” and “top rope” climbing methodologies.