Michael Tran

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Versatile in business and technology strategies. Experienced in agile planning and execution. Performer of the Change Management and Improvement processes.

**Experience**

**Wells Fargo** Implementation Consultant (8 years) 3/17/14 – 10/20/21

(Contract) 10/28/13 – 3/14/14

**Responsibilities**

* **Implementation Consultant:** serve as consultant to business teams impacted by policy, system and process changes. Acquire leadership support to implement changes amid competing enterprise priorities.
  + - Identify system and business process impacts to execute strategies including tracking and delivery of technology products. Provide communication plans of upcoming changes and post production validation.
    - Coordinate end-user testing including obtaining and documentation of system navigation and access, test scripts and production issue resolution. Work with Scrum and business SMEs to remediate testing defects and determine interim solutions when necessary.
    - Design training and business adoption plans facilitate team orientation of systems.
    - SharePoint site administration support and content backup including document libraries and lists for multiple business lines. Content and access management and perform solutions consultation.
    - Perform Change Management process that includes: design of business request site, perform work intake to identify solutions, documentation of deliverables and progress status reporting, development of control plan to manage the change, obtain cross-functional impact for risk mitigation, consult product development teams for solution prioritization, implementation of change and project closure. Provide minimal viable solutions for complex business needs.

**Interim Role**

* **Scrum Master**: coach and servant leader to the Product Manager and cross-functional team, guiding them to self-organize and sustain high output of product development.
  + - Guide new Scrum team through implementing agile methodologies and build relationships to transform the business culture towards the future state agile framework both virtually and on-site.
    - Eliminate development impediments through pillars of Scrum: providing transparency of the product to stakeholders, enabling immediate product inspection, and adapting product functionality based on feedback.
    - Work with stakeholders and business SMEs to identify dependencies for refinement of the product backlog and prioritization of minimum valuable product.
    - Coach the team in rehearsal for Sprint Reviews to present completed products as the primary measurement against program objectives. Iterative presentation of completed work results in timely feedback into the team’s improvement process for the team through retrospective ceremonies.
    - Track work development and trending for risk monitoring and issue resolution.
    - Conduct Scrum Ceremonies to ensure the team actively plans their work and coaching of welcoming changing requirements as an opportunity to demonstrate agile adoption.
    - Ensure that motivated employees have the support and trust needed to focus on their work. Build strong relationships and provide a safe environment that promotes openness and courage. Coach team members who have opportunities to improve their strengths and leveraging expert consultants to overcome team weaknesses.
    - Design of process to aid business partners in their training and procedural changes.

**Interim Role**

* **Project Manager**: of the implementation phases for projects impacting technology and process changes.
  + - Develop project plan and monitor progress to ensure milestones are completed on time. Escalate and resolve issues that could prevent completion of objectives.
    - Management of change requests including the sizing/prioritizing, approvals and release schedules.
    - Facilitate requirements gathering and review with business SMEs and the project team to develop the Business Requirement artifact.
    - Provide guidance to handle issues impeding the development lifecycle.
    - Determine work-around processes that the software would not have in scope.
    - Coordinate project processes and business implementation to ensure successful completion of application development and user adoption.

**Accomplishments**

* Design and implementation of Change Control process for Capital Markets resulted in successful transition of the responsibilities to our group after an organizational change.
* Served as Scrum Master to data analytics team for the retirement of a legacy system (Secondary Marketing System Retirement Program) and dispositioned the dependency of over 600 reports by elimination of redundant reports and consolidation of reporting. Implemented the adoption of the replacement platform (Capital Markets Data Mart) Business Objects environment.
* Implemented the replacement of legacy technology to the ARROW system (a suite of applications used to process tracking and control system used by Post Closing for tracking the life of a loan after funding) for requesting checks to vendors (Checkwriter Replacement Project).
* Led the implementation process of 5 departments across Capital Markets for compliance with the Home Mortgage Disclosure Act that requires financial institutions to provide mortgage data to the public (Home Mortgage Disclosure Act Project).
* Project managed the delivery of a web application for 100+ users impacting 7 Capital Markets departments and tens of thousands of mortgage loans. This project facilitated meeting the CFPB ruling requirement to improve ease-of-use of mortgage disclosure forms.
  + - Managed the resolution and closing of 60+ high and medium priority issues of the mortgage Post-Closing processes (TILA/RESPA Project).
* Led the implementation and post production command center for impacted business lines performing the Exceptions Management process. Enabled preparation of the Custodial and Exception Management process by managing implementation activities for business readiness and adoption.
  + - Developed procedures and conducted Train-the-trainer sessions to multiple business lines.
* Developed and managed the governance process for stewardship of 250+ business processes and maintenance of the metadata.
* Designed and developed web-based training of multiple applications:
  + 1. Loan Preparation and Onboarding (LPO) system training guide (web based).
       - Consulted with Learning and Development to develop enterprise training course of LPO.
    2. CORE system training guide for mortgage post-closing for CFPB compliance (web based).
    3. Loan Info System training guide for mortgage post-closing for CFPB compliance (web based).
    4. Trade Desk Clearing System navigation guide.
* SharePoint site implementation and administration across multiple teams including automation of site content backup.
  + - Coordination of team site migration from 2007 to 2013 platform.
* Assessed initial impacts of 330+ projects/initiatives and improved the project/change review process.

**Ameriprise Financial** Administrative Assistant (3+ years) 1/18/11 – 10/24/13

(Contract) 3/15/10 – 1/17/11

**Responsibilities**

* Administrative support to Technology Infrastructure teams (1 VP and 9 Directors and their teams).
* Conduct onboarding and orientation for new employees.
  + - Inventory management of department hardware and software.
    - Subject Matter Expert for onboarding process improvement and change implementation.
* Software piloting and assist post production issue root cause analysis.
* Implementation of SharePoint 2010 implementation.
  + - SharePoint project coordination, communications planning and deliverables tracking.
    - Document training content and conduct training classes.
    - Analyze business requirements for team sites architecture to drive end user adoption.
    - Team site branding and design consultant.
* Training of other staff of administrative responsibilities.
* Deskside support to VPs of technology and business operational groups.

**Accomplishments**

* Coordinated implementation and adoption of SharePoint 2010 and operational processes ($500K project in 2013).
  + - SharePoint site implementation for Business Management Office and Technology Infrastructure business lines.
    - Consulted business teams of SharePoint solutions and architecture of team sites.
* Coordinated migration from Lotus Notes to Outlook 2007 and 2010 email platforms ($12M project in 2012).
  + - Trained business and technology teams on Outlook.
* Improved onboarding process to ensure new hired employees/contractors were productive with laptops, equipment, desk location etc., and security access on day one.

**Education/Awards**

* Certified Scrum Master (CSM ID 754974 | Scrum Alliance expires March 2024). Agile and Scrum Training (Wells Fargo) and Scrum Master Training (Keyot).
* ITIL V3 Foundations Certification (Association of Project Managers Group).
* Certified Associate in Project Management [CAPM | Project Management Institute (PMI)].
* Planning, Gathering and Communicating Requirements (Wells Fargo).
* Project Management – PMBOK 5th & 6th Edition (Wells Fargo). Project Management Exam Prep – PMBOK 4th Edition (Ameriprise Financial).
* SharePoint site administration (Ameriprise Financial and Wells Fargo).
* Team Excellence Award winner for Windows OS Conversation and Reportable Data projects (Wells Fargo).

**Computing Competency**

* Intermediate understanding of web development (HTML, CSS). Basic understanding of JavaScript, Vuejs, PHP and Github.
* Jira (Atlassian: issue tracking and product development).
* Microsoft Office: Excel, Outlook, PowerShell, SharePoint, Visio, and basic understanding of SQL using SQL Server Management Studio.
* Techsmith SnagIt.