

## EXPERIENCE:

### **Senior IT Business Analyst**, Essilor USA, Dallas, TX

August 2011-Present

As a member of the Enterprise PMO, supported the IT Service Line Leaders in their efforts to help business units define technology needs. Acted as a liaison between the business and IT. Facilitated the Business Case Analysis (BCA) process for business partners by analyzing and documenting business requirements for technology projects and quantifying the benefits and risks of technology projects. Created business process diagrams and documentation for existing and proposed processes. Managed group of contract BAs.

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- Was the lead BA on a project to make the Essilor lab network the main producer of glasses for United Healthcare, another top 5 market share managed care provider.
  - Documented functional and non-functional requirements from all internal and external stakeholders.
  - Documented future state process flows.
  - Based on my understanding of the requirements, Essilor network and technology, suggested a solution that would limit the amount of development and business process change so that this effort could go to market sooner. This suggestion will save approximately \$300k in integration development.
- Was the lead BA on ECP Self Service. This project provided a single sign-on portal for ECPs to interact with Essilor. The portal will provide marketing materials, order entry, order status, access to the Essilor loyalty program and locator management.
  - Documented functional and non-functional requirements from all internal and external stakeholders.
  - Prioritized the backlog
  - Defined the acceptance criteria
  - Worked with a UI/UX firm to establish low-fidelity and high-fidelity wireframes.
- Was lead BA on a project to implement an order entry portal for EyeMed, a large managed care partner, that gave EyeMed ECPs direct access to Essilor labs. This project has allowed EyeMed to secure the second largest share of the market.
  - Volunteered to take over as lead BA on this effort when a consultant unexpectedly left Essilor during development. After being successful in this role, the BA role at Essilor was redefined such that the BAs in the Enterprise PMO were asked to lead from beginning to end on efforts going forward.
  - Documented functional and non-functional requirements from all internal and external stakeholders. This effort consisted of six separate work packages: Customer Registration, Order Entry, Job Status, Reconciliation, Remittance and Customer Service.
  - Managed issue log and produced snapshots for communication to internal and external executive management.
  - Documented TTP activities and schedule with development team
  - Developed documentation to manage order test plan. This documentation was used to communicate to internal and external partners the volume of test orders expected to flow through entire system over a 2 month span. This included SIT and UAT testing phases.
  - Documented Change Requests and facilitated estimation of Change Requests with development team
  - Continued to support this project by documenting enhancements to the original effort.
- Was lead BA on project to establish new billing method for digital surfacing products.
  - Worked closely with the business to analyze and define requirements to move from a manual, customer dependent invoicing model that relied on lab self reporting and inaccurate generator reports to an automated system generated invoicing model.
- Was lead BA on project to establish new EDI flows to large retail customer. This project supported 1,000,000 jobs annually from the largest retailer in North America.
  - Documented requirements from internal and external customers to establish EDI flows to support an open purchase order and the jobs that were to be invoiced against the open purchase order.
- Was lead BA on project to upgrade Oracle Reporting tool (OBIEE). This tool is used by more than 200 users at Essilor within the Shared Services and is utilized to produce approximately 8,500 reports monthly.
- Used Microsoft Excel and VBA to design and implement a cycle time metrics report of the BCA process. This data is used for reporting stage duration of IT efforts to executive management.

### **Senior Financial Analyst**, Essilor USA, Dallas, TX

July 2010-August 2011

Supported the CIO, IT leadership and the Lab Management System (LMS) leadership by coordinating budgeting process to ensure budgeting and forecasting deadlines were met. Analyzed and reviewed monthly results individually CIO, IT leadership and LMS leadership. Provided details of anomalies by researching the general ledger and accounts payable register. Reconciled the balance sheet monthly to insure accruals were in agreement with the invoices received by Accounts Payable. Provided comments and analysis of LMS monthly sales and operating results. Issued monthly invoices to Essilor Business Units based on the Essilor chargeback model. Produced monthly journal entries to reflect SLA work, PC charges, Project work, and invoicing accruals.

- Developed methodology to support the capital planning process by reconciling the IT Roadmap to the fixed asset team's capital budget. This methodology negated the need for software purchase to serve same function.
- Supported IT's Oracle R12 conversion analysis. Prepared analytics and reports that explained the financial implications of the project. These reports were used in the evaluation process by executive management.

### **Senior Financial Analyst**, SourceCorp, Dallas, TX

August 2008-May 2010

Analyzed the financial results of four major operating locations and the IT department. Created budget and forecast reports for four major operating locations and the IT department. Managed the capital expenditure budget and developed cost benefit reports. Assisted IT project managers in preparing ROI reports before, during and after implementation. Quantified hard and soft benefits of proposed technology projects. Provided the operating managers with ad hoc analysis for their operations.

- Created processes that employed Essbase and VBA macros in MS Excel to generate monthly revenue and EBITDA reports. These reports were essential for the operating managers to communicate their results and provide forecast updates to executive management.
- Developed a MS Access database that organized the general ledger and put it into a usable format for operating managers and project managers.
- Supported the IT department during restructuring by providing the CIO with budgeting and forecasting reports based on several proposed scenarios.
- Used MS Access to help accountants maintain data in an Accounts Receivables database.

**Risk Analyst**, Hunt Financial Ventures, Dallas, TX

July 2005-May 2008

Analyzed and monitored the risks of multi-strategy, convertible arbitrage, equity long-short, credit arbitrage, natural resources, special situations and statistical arbitrage hedge funds. Developed and documented processes to calculate position and fund exposures (e.g. Delta, Gamma, Vega, Rho, Omicron and Theta) and computed risk metrics including VAR (Value at Risk) and stress test figures. Produced weekly P&L estimates for the multi-strategy fund and fund of funds using estimates and holdings reports from the underlying managers. Maintained performance statistics on the firm's underlying funds and the master fund. Produced tearsheets and letters that kept current investors informed about the performance and status of the firm's funds.

- Developed a Windows Script that utilized Bloomberg and MS Excel to download fund holdings from prime broker sites and ran daily VAR reports.
- Created fund comparison tools using MS Access, MS Excel and Bloomberg. During my three years at HFV, these tools which assisted the investment committee in the asset allocation process, were essential in helping the firm add twelve funds.
- Designed a report that showed weekly position turnover of the firm's equity long-short funds.
- Created reports that gave descriptions of all the equity holdings of the firm's equity long-short funds.
- Developed marketing documents that concisely described each fund and its historical investment performance. These documents were essential to the firm's capital raising efforts.

**EDUCATION:**

**M.B.A.**, Cox School of Business at Southern Methodist University  
Concentration in Finance

December 2009

**B.S. Business Economics and Management**, California Institute of Technology  
Awarded Presidential Scholarship

June 2004

**PROFICIENCIES:**

- Java Script, HTML, CSS, Bootstrap Library, JQuery
- Jira, SQL, C++, MS Excel, Windows Script, MS Access, Visual Basic, and MS Power Point