

# PRANAVI MORTHALA

Austin, Texas | +1 5127660986 | [pranavir09@gmail.com](mailto:pranavir09@gmail.com)

## SUMMARY

Business Analyst with 4+ years of experience in financial services and technology, specializing in process automation, risk management, and regulatory compliance. Skilled in requirements gathering, data analysis (SQL, Power BI, Tableau), and Agile delivery to optimize workflows, reduce costs, and improve decision-making.

## PROFESSIONAL EXPERIENCE

### Broadridge

**Jul 2022 - Present**

*Business Analyst*

*Austin, Tx*

Project Scope - Led enterprise-wide business process automation initiatives in the finance and banking sector, optimizing workflows, enhancing regulatory compliance, and improving cost efficiency. Collaborated with cross-functional teams to align business objectives with technology solutions, ensuring seamless integration of financial data and risk management practices.

- Conducted 50+ stakeholder interviews across finance, risk, and compliance teams to identify inefficiencies, define business needs, and propose automation strategies, resulting in improved business processes.
- Developed over 100 user stories, acceptance criteria, and functional specifications for Agile development teams, ensuring alignment with financial regulations such as SOX, Basel III, and AML/KYC.
- Led 10+ process reengineering workshops focusing on loan processing, fraud detection, and reconciliation workflows, achieving a 20% reduction in operational costs within six months.
- Designed and implemented Power BI dashboards, providing real-time insights into financial risk, revenue trends, and regulatory compliance, accelerating decision-making by 50%.
- Partnered with finance teams to analyze multi-million-dollar budget allocations, identifying cost-optimization strategies and automating manual financial reporting, reducing data processing time by 40% and improving accuracy by 95%.
- Assisted in large-scale system migrations impacting 5,000+ users, managing requirement documentation, UAT coordination, and ensuring seamless deployment of core banking and risk management systems, resulting in 35% faster defect resolution. Worked closely with IS&T to identify and prioritize enhancements in DAM workflows, improving asset discoverability and system usability.
- Prepared executive-level reports summarizing financial performance, risk factors, and compliance metrics, contributing to a 25% increase in overall process efficiency.

### Accenture

**Mar 2020 - Jun 2021**

*Business Analyst*

*Hyderabad, India*

Project Scope - Led continuous process improvement initiatives within the finance and banking sector, focusing on workflow automation, operational efficiency, and cost reduction strategies. Collaborated with IT, operations, and executive teams to enhance system capabilities, ensure regulatory compliance, and drive digital transformation.

- Conducted root cause analysis using Lean Six Sigma methodologies, identifying inefficiencies in financial operations, loan processing, and risk management workflows, leading to a 35% reduction in processing time.
- Led business requirements workshops, gathering functional and non-functional specifications for system enhancements and automation of key banking processes, improving efficiency across departments.
- Developed Standard Operating Procedures (SOPs) to institutionalize process improvements, ensuring compliance with banking regulations such as SOX, Basel III, and AML/KYC.
- Facilitated stakeholder alignment meetings with finance, risk, and IT teams to ensure cross-functional alignment on process changes and implementation timelines.
- Monitored Key Performance Indicators (KPIs) post-implementation, tracking success metrics and identifying further optimization opportunities, improving overall data accuracy by 25%.
- Led change management initiatives, preparing impact assessments, and communicating process modifications to financial analysts, loan officers, and compliance teams.
- Designed and delivered engaging training materials including demo videos, slide decks, and quick-start guides using tools like Camtasia and PowerPoint, improving platform adoption by 40%.
- Developed detailed process flow diagrams in Microsoft Visio, mapping system interactions, loan origination workflows, and compliance reporting processes for cross-functional teams.
- Utilized SQL queries and data visualization tools (Power BI, Tableau) to analyze financial performance, track fraud patterns, and provide real-time insights for leadership teams.
- Partnered with Quality Assurance (QA) teams to define and execute test cases, ensuring system functionalities met business objectives, reducing post-deployment issues by 30%.
- Developed walkthroughs and interactive demos using tools like Loom and Scribe, reducing onboarding time for new users by 30%.
- Acted as a liaison between business stakeholders and IT teams, ensuring technical solutions aligned with operational needs, financial risk mitigation, and regulatory compliance requirements.
- Conducted market research and competitive benchmarking, evaluating industry best practices to enhance digital banking services, customer experience, and fraud prevention measures.

## ACADEMIC PROJECT

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### Loan Approval & Risk Assessment System

#### Academic

- Developed a Loan Approval & Risk Assessment System to streamline the loan evaluation process for financial institutions.
- The system automated loan application processing, improved risk assessment accuracy, and ensured compliance with Basel III, AML, and KYC regulations.
- Business Analysis & Requirement Gathering - Conducted stakeholder interviews with financial experts to gather business requirements and define key decision criteria for loan approvals.
- Database Design & Management - Designed and implemented a MySQL/PostgreSQL database to store and manage loan applications, borrower profiles, and financial risk data.
- Workflow Automation - Developed automated risk assessment workflows, reducing manual loan processing time by 35% and enhancing efficiency.
- Data Processing & Analysis - Utilized SQL queries to analyze borrower financial history, credit scores, and risk factors, improving loan approval accuracy.
- Data Visualization & Reporting - Created interactive Power BI dashboards to provide real-time insights into loan approval rates, default risk trends, and regulatory compliance metrics.
- Testing & Implementation - Conducted User Acceptance Testing (UAT) and developed test cases to ensure the system met business and regulatory requirements.
- Compliance & Security - Ensured adherence to SOX, AML, and KYC regulations, implementing encryption techniques to protect borrower data and prevent fraud.

## EDUCATION

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### Auburn University at Montgomery

**Aug 2021 - Dec 2022**

*Master's, Management Information Systems*

### ICFAI University, Hyderabad

**Aug 2017 - May 2020**

*Bachelor of business administration*

## TECHNICAL SKILLS

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- **Business Intelligence & Analytics:** Power BI, Tableau, Excel (Advanced)
- **Databases & Querying:** SQL, MS Access
- **Project Management Tools:** Jira, Confluence, Trello, MS Office, MS Project, MS Sharepoint, MS Word, MS Powerpoint, MS Excel
- **Process Modeling:** BPMN, Visio
- **Programming Languages:** Python (for data analysis), R (basic)
- **Others:** Business Process Modeling, Business Requirements Gathering, Gap Analysis & Impact Assessment, Workflow Automation & Optimization, Use Case & User Story Development, Agile, Scrum, Stakeholder Management & JAD Sessions, Change Management & Risk Analysis, SQL & Database Management