**Jeff Frank**

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**Greenwood Village, CO**

**PROFESSIONAL SUMMARY**

* Seven plus years of experience in Business Analysis/Process Analysis/Modelling, Life Insurance, business requirements gathering, database design and development of Web Based, and Client/Server applications.
* Experience as Business Analyst with expertise in Insurance domain, Business Process Engineering, Systems/Solutions Engineering, Strategic Planning, and Systems Analysis.
* Tested online life insurance applications to verify they functioned properly.
* In-depth knowledge of creating use case, activity, logical, component and deployment views with rational tools to extract business process flows and workflows there by helping development and quality assurance teams in understanding the requirements.
* Experience with Iterative Software Development Life Cycle Process as per Rational Unified Process (RUP), involved in inception, elaboration, construction & transition phases using rational tools like RequisitePro, ClearCase, ClearQuest during various phases of RUP.
* Results-oriented Joint Application Development (JAD) Facilitator and meetings coordinator with excellent interpersonal skills.
* Proficient in business process modelling, documentation, and testing using Rational Suite (Rational Rose, RequisitePro, SoDA, ClearQuest, Robot) as well as MS Visio and MS Project in combination with UML diagramming techniques.
* Analytical, methodical, and resourceful approach to problem solving, identifying and documenting root causes and corrective actions
* Performed Gap Analysis to check the compatibility of the existing system infrastructure with the new business requirements
* Expertise in Change Management Process (Identify, Analyse, Evaluate, Plan, Implement, Review and Close).
* Strong oral and exceptional written business communication skills
* Hard working, positive thinking, self-starter with a strong goal orientation
* Excellent meetings facilitator with excellent inter-personal and conflict resolving skills.
* Proven success as a business analyst through the years, providing a well-balanced understanding of business relationships, business requirements, and technical solutions.
* Knowledge of GAP Analysis, organizing, facilitating and coordinating conference calls, brainstorming sessions, working sessions and other regular project meetings.
* Worked as Issue, Risk and Dependency coordinator to drive the project towards successful completion.
* Responsible to Track, Document, Capture, Manage and Communicate the Requirements using Requirement Traceability Matrix (RTM) which helped in controlling numerous artifacts produced by the teams across the deliverables for a project.
* Involved in Test Planning, Test Preparation, Test Execution, Issue Resolution and Report Generation to assure that all aspects of a Project are in Compliance with the Business Requirements.

**TECHNICAL SKILLS**

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| **Languages** | C, C#, VC++, VB, VB.NET, C#.NET, ASP.NET, Java, SQL, HTML, XML, VB Script, ASP, JavaScript, JSP, J2EE |
| **Automation Tools** | Microsoft Visio, Rational Rose, Rational Clear Case, Rational RequisitePro, Documentum |
| **Testing Tools** | Quick TestPro (QTP), Test Director, Jira, Confluence, Win Runner |
| **Bug Tracking Tools** | Mercury Test Director, Rational Clear Quest |
| **Utility Tools** | Microsoft Office Suite, Microsoft Project, TOAD, Adobe Photoshop |
| **Reporting Tools** | Crystal Reports, SQL Server Reports (SSRS) |
| **Data warehousing Tools** | Informatica, Business Objects, Cognos, Erwin |
| **Databases** | Microsoft-Access, PL/SQL, SQL Server, Oracle, DB2, Sybase |
| **Application Servers** | IBM Web sphere, ATG Dynamo, BEA Web Logic |
| **Operating Systems** | UNIX, Windows, Linux |

**PROFESSIONAL EXPERIENCE**

**Great West Financial - Greenwood Village, CO Jan 2017 – Present**

**Project Manager / Business Analyst**

Great-West Financial is the nation's second largest insurer in sales of individual life insurance through banks. In addition to term and single premium life insurance, they offer annuity products and executive benefits products. Empower Retirement provides retirement savings products and services for public, corporate, and non-profit employers, as well as private-label recordkeeping and administrative services for other providers of defined contribution plans. It also offers individual retirement accounts and advisory services, through its registered investment advisor.

**Responsibilities:**

* Facilitated JAD sessions with SMEs and business analysts from other feeder systems for a detailed analysis and a better understanding of impact of various projects on each other.
* Communicated with Customer Service on ACORD Forms design and other technical problems.
* Planned, organized, communicated and executed efforts for annuity and life insurance product initiatives.
* Managed intricate legally regulated Life insurance product new customer policy guide, which welcomed new customers to client and provided them with critical insurance policy information.
* Developed Logical and Physical data models that capture current state/future state data elements and data flows using Erwin.
* Developed test plans with QA team and helped to develop test cases for system testing.
* Assigned tasks among development team monitored and tracked progress of project following agile methodology.
* Created UAT plans with several test cases for each project to ensure that the system runs smoothly after the proposed enhancements or changes have been made.
* Reviewed test results and coordinated with testing and development team to correct the issues.
* Developed timelines for project delivery, and managed projects/resources.
* Analysed business requirements and segregated them into Use Case Diagrams, Activity Diagrams, Sequence Diagrams, and OOD using Borland Together according to UML methodology thus defining the Data Process Models.
* Responsible for preparing Business Requirement Document (BRD) and then translating into functional specifications and test plans. Closely coordinated with both business users and developers for arriving at a mutually acceptable solution.
* Documented and delivered Functional Specification Document to the project team.
* Used MS Project to manage schedules, deadlines and resources and collaborate on the project.
* Interacted with the developers on resolving the reported bugs and various technical issues.
* Assisted the QA team in designing the Test Plan and Test Cases for User Acceptance testing.

**Environment:** Microsoft Office Suite, Microsoft Visio, UML, SQL, SDLC, RUP, VBA, Excel Macros, Quality center, Rational RequisitePro, Rational ClearCase, ClearQuest, Rational Rose, Jira, Application xtender, Visual Studio.

**Northwestern Mutual -** [**Milwaukee, WI**](https://www.google.com/search?q=Milwaukee+Wisconsin&stick=H4sIAAAAAAAAAOPgE-LUz9U3ME2LN69S4gAxUypzLLW0spOt9POL0hPzMqsSSzLz81A4VhmpiSmFpYlFJalFxQAWA2hvQwAAAA&sa=X&ved=0ahUKEwig0PO70q3bAhXIeX0KHUBTAYcQmxMIkQIoATAb) **Sep 2014 – Dec 2016**

**Sr. Business Analyst**

The Northwestern Mutual Life Insurance Company is an American financial services mutual organization based in Milwaukee. The financial security company provides consultation on wealth and asset income protection, education planning, retirement planning, investment advisory services, trust and private client services, estate planning and business planning. Its products include life insurance, disability income, and long-term care insurance, annuities, investment and investment advisory products and services.

**Responsibilities:**

* Involved in reviewing the business process and possible improvements based on user requirement.
* Interviewed the Stakeholders and other end users, asking detailed questions and carefully recording the requirements in a format that can be reviewed and understood by both business people and technical people.
* Worked directly with the Life Insurance and Annuity business unit requesting the system change in order to develop, write, and provide accurate business requirements.
* Used SDLC (System Development Life Cycle) methodologies like the RUP and the waterfall.
* Used MS Visio to create business process flowcharts and workflow diagrams.
* Involved in process modelling, conducted & Participated in Joint Application Development (JAD) sessions with System Users.
* Gathered requirements by conducting meetings and brainstorming sessions with end users and SME and document them using Requisite Pro - the documentation tool offered by Rational.
* Extensively involved in data modelling.
* Data mapping, logical data modelling, created class diagrams and ER diagrams and used SQL queries to filter data within the Oracle database
* Performed Gap Analysis of the processes to identify and validate requirements.
* Identified/documented data sources and transformation rules required populating and maintaining data warehouse content.
* Facilitated Joint Application Development sessions and facilitated stakeholder meetings to identify business process and requirements; exhaustive management of project requirements using CaliberRM
* Conducted meetings and understood the requirements of the sales and marketing team
* Organized requirements into high level Use Cases and low level Use Case Specifications and modelled them into UC, Activity and Sequence Diagrams using Rational Rose and MS Visio.
* Recorded retention stored in Knowledge Link. Ad Hoc reporting, Admin for MS Project, Excel dbase and pivot tables, Clarity and MS Project Server Admin duties.
* Applied UML notations and methodology in developing models that accurately represent the business process and workflows and clearly communicate them to the stakeholders.
* Used MS Sharepoint for the purpose of managing documents and for hosting websites which was used to access shared work spaces and documents.
* Facilitated JAD sessions involving the management, development and user teams for clarifying requirements and facilitating better communication.
* Coordinated and prioritized outstanding defects and enhancement/system requests based on business requirements, allowing sufficient time frame to ensure accuracy and consider deadlines
* Assured that all Artifacts are in compliance with corporate SDLC Policies and guidelines.
* Reviewed the Test Plan developed by the testing team for testing the application.
* Assisted the QA personnel in the creation of Test Cases using Rational Test Manager.

**Environment:** Rational Suite (Rose, Requisite Pro), SQL, Rational Unified Process (RUP), Windows XP, UML, MS-Project, MS-Office Suite, MS Visio.

**State Farm - Bloomington, IL                                                     April 2012 – Aug 2014**

**Business Analyst**

State Farm is one of the leading providers of Insurance and Financial services in United States of America and Canada. State Farm currently has more than 90 insurance products ranging from Auto, Fire and Life insurance. The main goal of the project was to integrate the Claims Experience on a unified platform for better experience for the Customer and Claims processing operates on a system which is fully supported and which offers the opportunity to improve process, affect cost savings, and grow the Insurance business.

**Responsibilities:**

* Interviewed SMEs and Stakeholders to get a better understanding of client business processes and gather business requirements. Requirement gathering, Business Process flow development, and Business Analysis.
* Managed the output requirement project for various Life insurance products.
* Conducted controlled brainstorming sessions with project focus groups for collecting high level business requirements.
* Being as a Subject Matter Expert for BPM solution for shared delivery service and annuity host, Life insurance with in the cooperation in the area of content management, Record management and compliance, Business process management and image capture.
* Prepared the Functional specifications, and tested the interfaces.
* Conducted several Requirement Gathering Sessions for gaining detailed requirements and finalizing Business Requirement Document (BRD).
* Developed data conversion strategy for data migration from legacy systems to Technology product modules.
* Involved in data mapping, field mapping of the data elements responsible for the migration BRD.
* Performed GAP analysis of business rules, business and system process flows, user administration to be used for the new migration platform.
* Conducted Functional Walkthroughs, User Acceptance Testing (UAT) sessions, and assisted the development of User Manuals for customers
* Participated in the application scrum meetings and the sessions.
* Created and maintained a project schedule using MS Project showing all target dates for deliverables.
* Worked on data modelling and produced data mapping and data definition documentation.
* Worked with the project manager for planning and organizing the project activities, and in communicating with other business centre mangers and stakeholders of the project.
* Conduct complex documentation and user needs analysis. Interface with team and staff to develop HL7 integration.
* Documented high level requirements by writing migration BRD, Prepared Provider Migration BRD.
* Planned and documented procedures for data processing and prepared data flow diagrams for the application. Worked in close co-ordination with the testing team in developing test plan and test cases from functional and business requirements.
* Generated data element matrix encompassing all the data element report wise including the data mapping for the data warehouse.

**Environment:** MS Project, MS Office, Rational Suite, MS Visio, RequisitePro, ClearQuest, RUP, UML.

**MassMutual - Springfield, MA Aug 2010 – March 2012**

**Business Analyst**

MassMutual is one of the largest life insurance companies globally. MassMutual provides financial products such as life insurance, disability income insurance, long term care insurance, retirement plan services, and annuities. This is a multimillion dollar Business Process Re-design remediation project that got initiated by Annuities Risk management team at Mass Mutual. Clients (customers) who purchased Annuities since Mass Mutual started selling Annuities and Life Policies were analyzed to see if their periodic payments are made accurately. Business Intelligence Analysis methodologies were employed to investigate the process. The investment options for a variable annuity are typically mutual funds that invest in stocks, bonds, money market instruments, or some combination of the three.

**Responsibilities:**

* Documented all the Business and Functional requirements in the BRD before getting the business signoff.
* Gathered requirements from users and business for the metrics reports to be generated in OBI tool.
* Worked with the Business users, Solution Architects, Application Leads and SMEs to document the Business Requirement Documents.(BRD)
* Ensured the timely signoff of the BRDs from business.
* Understood the client's business process/architecture for Business Analysis tasks.
* Deep dive into clients Life Insurance products and business process to better integrate in proposed tactical solution.
* Created wireframe and review with business for signoffs.
* Go to person for any queries related to requirements and project.
* Communicated and managed change request to appropriate stakeholders for approvals and awareness.
* Worked in a distributed agile environment to fulfil the project's goal and deliverables.
* Facilitated and participated in daily stand-ups, Agile Planning sessions and Retrospective sessions.
* Documented user stories using tools like Rally and MS Excel.
* Fulfilled the role of a proxy product owner for acceptance of some of the user stories.
* Accepted and closed the completed user stories.
* Reviewed the project documentations and test cases prepared by the project team.
* Reviewed and validated the data elements gathered as per requirements.
* Tested and validated the reports in Oracle BI as per the requirements.
* Worked closely with business users and testing team during front end system testing, performance testing and User Acceptance Testing.
* Worked with business in creating manual and training material for new functionalities of the system.

**Environment:** SDLC, Rational Suite (Rational Rose, RequisitePro, ClearQuest, ClearCase), MS office Suite, UML, MS Visio, MS Project.