

# Anita Bali

Robbinsville, NJ

-Email me on Indeed: <http://www.indeed.com/r/Anita-Bali/3b44421a763f6c89>

## Work Experience

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### **Senior Project Manager and Team Lead**

MJH Life Sciences

April 2019 to Present

Total oversight in all facets of up to 300 assigned deliverables annually using the Agile Methodology. In addition manage 5 direct reports and their individual portfolios of up to 200 deliverables. Responsibilities include faculty management; logistics management; management of budgets up to \$1M; submission, adherence, and coordination of shared services such as marketing, creative design, editors, studio, and virtual and live events teams. The overall goal is on-time execution using accurate project timelines, quality control of project deliverables, approval from all stakeholders, and CME/CE compliant programming. As team lead conduct business unit meetings for planning and projections; assignments of projects to team members; develop goals and complete performance reviews of direct reports; create and deliver team trainings; and generate weekly, monthly, quarterly, and annual revenue and deliverable pacing reports.

- Work with and advise Sales Associates to explore the scope of the project and its deliverables
- Organize "kick-off" meetings and regular status meetings for assigned projects
- Develop and maintain project tracking reports for internal and external review, advise appropriate personnel on milestone deviations, and conduct weekly client meetings to update on project status and change in scope of projects
- Introduce stakeholders to the program; share a timeline schedule for all project components; define and assign responsibilities, deliverables, and deadlines
- Faculty management including planning calls, organizing travel and stay, contracting and payment, and conducting in studio or virtual filming
- Oversee trafficking of projects through content, editorial, production, digital and circulation processes, and communicating with team members as needed
- Complete quality reviews of project deliverables ensuring applicability with project specifications, and manage performance against the scope of work
- Track project revenue, and report/update accounting with new projects and allocation of funds by franchise and delivery platform
- Develop positive working relationships with key members of MJH shared services including, but not limited to, accounting, editorial, marketing, digital, events, MJH Studios, creative, and corporate
- Document and create Standard Operating Procedures

### **Vice President - Premier Relationship Advisor**

HSBC Securities (USA) Inc.

April 2014 to November 2018

Excelled as portfolio Manager, used financial plans, fundamentals of wealth planning to manage client portfolios. Helped with estate and trust planning through asset allocation, life insurance, and long term

care products.. Worked with the broader branch and direct teams to ensure achievement of business performance measures and plan. Updated and analyzed client financial information to identify bank, lending, and wealth solutions that were suitable to meet the client's needs and goals

- Managed a \$75 million portfolio of investment, deposits and lending
- Acquired, developed, advised, and retained a portfolio of premier clients with a of minimum \$100,000 plus in balances
- Increased the number of fee based managed accounts from \$200,000 to \$10 million in assets under management

### **Vice President - Branch Manager**

JPMorgan Chase Bank - NA  
February 2010 to April 2014

Appointed by senior management as a turnaround project manager to acquire and retain assets. Integrated and engaged business partners into the branch sales team, leading to higher sales production and seamless customer interaction.

Successfully provided discipline and structure around branch sales activities which lead to increased sales performance. Coached and developed 17 personnel.

Made the branch operationally sound and audit ready by streamlining branch procedures.

- Grew the branch deposit and investment assets 229% from \$270 million in 2010 to \$620 million by year end 2013
- Coached and mentored branch personnel to make them subject matter experts
- Iterated and diligently followed Chase service standards leading to 80% high customer satisfaction scores and mystery shops.
- Engaged Chamber of Commerce and local associations to increase brand presence

### **Vice President - Branch Manager**

JPMorgan Chase Bank - NA  
January 1996 to December 2010

Project Managed the launching of two new build branches of Chase. Worked with HR to hire staff, identified business partners and marketed the branch during construction. Post construction responsibilities included managing, selling, developing, and training sales teams in outside calling, developing new business relationships, and generating new consumer and commercial loan requests

- Grew the branch balances from \$0- \$30 million in deposits and investments, and booked loans of \$7 million in the first year
- Trained and coached entire sales and operation staff of 17 to perform as per Chase standards
- Implemented and oversaw all operations of the branch to ensure 100% audit readiness

## **Education**

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### **Bachelor of Commerce in Financial Accounting and Auditing**

Bombay University - Mumbai, Maharashtra

### **Certificate**

Ramapo College

## Skills

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- Microsoft Office Suite
- Workday
- Adobe Acrobat Pro
- Urdu
- Zoom Hindi
- Punjabi
- Freedcamp
- Marathi
- Microsoft Teams
- Workfront
- Salesforce
- Gujarati
- Jira

## Certifications and Licenses

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### **PMP**