SHIVANI JHA

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12 years of experience successfully leading all technical aspects of enterprise level business intelligence and complex software initiatives from inception through project sign-off. Expertise includes coordinating teams as large as twenty developers, analysts, and testers to ensure timely completion of critical project deliverables. Several projects for which I provided leadership were highly customized solutions used to manage multi-billion dollar portfolios.

Professional Summary

- Experienced Scrum Master and a Lead Business/Systems Analyst with over 12 + years of IT experience in all phases of the Software Development Life Cycle implementing Business Analysis/Project Management methodologies such as Agile (SCRUM) , Waterfall and RUP.
- Proficiently organized and facilitated daily scrum, Sprint reviews and retrospectives , Sprint and Release Planning.
- Collaborated closely with Product Owners on backlog grooming to keep backlog relevant and prioritized, ensuring acceptance criteria were agreed upon and stories were ready for sizing. Effectively managed team's progress, including burn down, Velocity and release planning.
- Skilled in facilitating change management across entire process from project conceptualization to testing through project delivery, Software Development & Implementation Management in diverse business & technical environments, with demonstrated leadership abilities and excellent communication skills.
- Skilled in organizing, managing and tracking multiple tasks and assignments with frequently changing priorities in a fast-paced work environment
- A self motivated team player and a leader who is sincere, committed, quick learner, detail-oriented with analytical, interpersonal and problem solving skills.

Certifications and Educational Qualifications

- **CFA** (Chartered Financial Analysis) Level I candidate (CFA Institute, Virginia USA)- Present
- **Masters of Business Administration (**Major – Finance and IT) - India 2002
- **Post graduate diploma in Business Management -** India, 2001
- **Bachelors of Commerce – Finance** (Honors) Delhi University- India, 2000
- **Full Stack Development Bootcamp -** Rutgers University , 2020

Technical Skillset

- **The Browser:** HTML, CSS including animations such as Transform & Transitions, Keyframes, Flexbox etc.,Bootstrap,JavaScript (ES2015, ES2016 & ES2017), jQueryCutting Edge Development: React.js
- **API Interactions:** APIs, JSON, AJAX, Real Time Cloud Database via Firebase
- **Databases:** MySQL, MongoDB, Index DB
- **Server Side:** Templating Engines, Sessions, Writing tests, Node.js, Express.js, Creating APIs, MVC, User Authentication, ORM (Sequelize)
- **Dev Tools:** Heroku, Git, GitHub
- **CS Fundamentals:** Algorithms, Data Structures
- **Operating Systems:** Windows, MacOS
- **Project Management Methodologies:** Waterfall, Agile, Software Development Lifecycle (SDLC)
- **Requirements and Design Tools:** VersionOne, Confluence, MS Office including Visio, Pencil

Professional Experience

Scrum Master /Lead Business Analyst – Bank of New York Mellon (Jersey City , NJ)
April 2017 – Present

Project Scope: Accounting Data Mart/Warehouse
A centralized repository/warehouse of Accounting data built with proven technology and controlled via automation and production oversight to provide an application agnostic repository of data need for Clients consumption via a self-service interface in Nexen/ERS. A highly responsive, platform agnostic accounting data structure that can support (in a highly performant way) any of the information delivery mechanisms namely extract, dashboard, ERS reporting etc.

- Single point of contact between Program Management and IT groups from Clients needs and solution planning , sizing to fulfillment.
- As a Scrum Master , facilitates sprint Planning, daily scrums, stakeholders meetings, design sessions with the tech teams and release demonstrations.
- Manage Project Scope to ensure delivery complains with scope commitments.
- Monitor and manage dependencies on other teams and projects to ensure potential risks are resolved timely.
- As a Business Analyst, documented designs and technical flows for various microservices interacting with Eagle Investments Systems (STAR/PACE) to source EOD/SOD/Intraday data for clients by their processing regions and ids, writing transformation logics mapping Eagle attributes to external client API names, conversion documents from Internal Canonical to API names, Loading logic to data mart of various subject areas (Holdings/Positions, Transactions including both Traded and Settled Cash, Tax lots and Disposal Lots, Pricing and Fx rates, Account , Security reference), File format to match to the external Client Schema.
- Document various business rules and logic for the PUB-SUB (Publication and Subscription) of Data transmission and Model
- Documented specifications for Core APIs and MO Standard reports.
- Document naming conventions for data transmissions Topic Hierarchy/Queues.
- Data validation and support for various Clients and internal surround systems

Environment: Agile Methodology, Share Point, JIRA, Confluence, SubLime, DBeaver, PostGres Database, MS Office, MORPH, BBH, CSM (Central Security Master), CAP (Client Account Profile), TMV (Trade Management Valuation) , PTS (Position Tracking System) **,** NEXEN/ERS **,** Eagle Investment Systems

Lead Business Analyst/Scrum Master– State Street (Boston, MA)
April 2015 - Nov 2015

Project Scope 1: Project Iceberg (Legal and Fiduciary Risk Data Acquisition & Management)
A single global firmwide, scalable and responsive risk data acquisition infrastructure, with the goal of; eliminating legacy technology, enhancing the timeliness and usability of data to meet a changing environment, streamlining data management to minimize manual work supporting current risk management processes.

- As a Scrum Master , facilitates sprint Planning, daily scrums, stakeholders meetings, design sessions with the tech teams and release demonstrations.
- Manage Project Scope to ensure delivery complains with scope commitments.
- Monitor and manage dependencies on other teams and projects to ensure potential risks are resolved timely.
- As an analyst, design and document existing manual process/workflow for logging an event by all State Street entities   such as SSGA (State Street Global Advisors), SSGM (State Street Global Markets), SSGS (State Street Global Services), SSGE (State Street Global Exchange).
- Organized many workshops for SSGA, SSGAM, SSGE and SSGS business community,

operations and administration community to design, document and seek approvals on the proposed workflow.
- Assessed third party tools by participating in workshops. Understood end to end workflow (log an event and event close) and wrote a single document for the senior management highlighting many features offered by them.
- Document blueprints for golden sources used for data acquisition and management for logging an event by all State Street entities, Business Requirements and Functional Specifications documents, Use Cases, Process Maps, Cross Functional Swim lanes, Sequence Diagrams.
- Used advanced SQL queries for reports, data mapping and data validation.
- Documented Test Plans and Test Cases/Test Scripts to cover overall quality assurance.

Environment: Agile Methodology, Share Point, AIS, LETA, LEDR,Open PAGES, Cognos Reporting, MS Office

Senior Business Analyst – John Hancock (Back Bay, Boston City)
July 2014 - March 2015

Project Scope 1: MAM (Manulife Asset Management) Client Reporting – End to end automation of data feeds for different systems/engines – PORTIA (Book of Records), POINT, Confluence UNITY, FactSet, Salesforce, StatPro to AMDR (John Hancock Database).
Project Scope 2: Performance Returns Reconciliation

- Document the existing manual process of : 1. Data extract from PORTIA, POINT, Confluence UNITY, FactSet, Salesforce and StatPro; 2. Understand and document manual data validation such as Total Returns Comparison between PORTIA and UNITY, PORTIA and FactSet done by Performance Analysts; 3. Understand and document re-formatting of data and map to future state by documenting process flows, data mapping tables of how the data will flow automatically end to end without human intervention doing manual validation and processing of data and sending to database team for upload.
- **Performance Returns Reconciliation** – document the existing manual process of total returns comparison between different systems such as Confluence UNITY-PAGES, PORTIA–POINT, PORTIA-FactSet, PORTIA– Confluence UNITY and future state for automatically reconciling total returns and generating reconciliation reports for the benefit of business community.
- Document Business Requirements and Functional Specifications Documents, Use Cases, Process Maps, Cross Functional Swim lanes, Sequence Diagrams.
- Used SQL queries for reports, data mapping and data validation.
- Involved in creating Test Plans and Test Cases/Test Scripts to cover overall quality assurance.

Environment: Agile Methodology, Share Point, Blueprint, BPMN (Business Process Model and Notation), PORTIA, POINT, FactSet, Confluence UNITY/UNITY Perform, PAGES, and HPQC.

Senior Business and Systems Analyst – TIAA-CREF (Midtown, NYC)
May 2013 - April 2014

Project Scope: Seismic Implementation for Institutional Clients - It is an enterprise application that generates meaningful, integrated content – live from a cloud based library of the company's data and content. It helps Relationship managers and Advisors to build custom power point slides for presentations to their institutional clients.

- Authored user stories with acceptance criteria by eliciting requirements with cross functional team for Seismic Implementation.
- Identified gaps and authored 'As-Is' and 'To-Be' process maps and specifications for creating report templates within Seismic Data Library and Requester Application.
- Wrote Business Requirements, Use Cases, Work-Flows, Sequence Diagrams for development of Requester App allowing for editing of 'Business Plan' template and Live content in real-time.
- Wrote Functional and technical specifications for the development of content publishing services for distribution of TIAA-CREF content for consumption by multiple platforms (e.g. Mobile, Web

and Terminal).
- Wrote basic/advanced SQL queries for reports, data mapping and data validation.
- Involved in creating Test Plans and Test Cases/Test Scripts from the Business Requirement document and design document to cover overall quality assurance.
- Documented TIAA-CREF Seismic Step by Step User Manual for the end users – RM's and Wealth Advisors.
- Organized training sessions to end users, introduced the guide I wrote for them and trained them on how to use Seismic Requester Application to build custom client presentations in different formats.

Environment: Agile (SCRUM), MS Office 2010, Seismic, SharePoint, SQL

Sr. Business and Systems Analyst – Rackspace Hosting (San Antonio, TX)
Dec 2012-May 2013

Project Scope 1: Oracle Billing and Revenue Management – Converge 6 billing systems (Legacy Systems) into one i.e. Oracle BRM.
Project Scope 2: Discounts and Promotions – Racker and Internal Accounts, Volume Pricing, Commit Discounting, Enterprise Free trial and Startup companies Programs, Free tiers.

- **Discounts & Promotions:** My role was to elicit business and functional requirements from different user groups such as Finance for Price and Revenue , Marketing – for code management process, Billing and operations – how they bill the clients and generate invoices and to document AS-IS and TO-BE process maps , epics and user stories with agreed upon acceptance criteria's with all stakeholders.
- **Business Service Layer:** With information and solution architects to list/identify system impacts, interactions between UI's, backend systems and getting together logical diagrams for each module/ workflow and conducting reviews with development and testing teams.
- **Sydney Launch:** Document user stories for price changes for cloud products usage for Sydney customers.
- **Cloud Product on boarding:** Documenting business and technical requirements for cloud products on boarding to BRM from legacy systems.
- Documented user stories and acceptance criteria in VersionOne, SCRUM meetings notes, defects track and resources, % of work completed.
- Planned poker sessions and prioritizing user stories for sprints, demo and release.
- Co-ordinated and hand over each sprint results and demo to the product owners and team for final sign offs.
- Assisted in the designing and development of Quality Assurance standard and processes to all levels of Project team.

Environment: Agile (Scrum), VersionOne, MS office tools, SharePoint, Sales force, Oracle Billing and Revenue Management.

Lead Business Analyst – Royal Bank of Canada (London, Jersey - UK)
JAN 2012 - DEC 2012

Project 1 Scope: CRIMS and Triple A Plus reporting integration with London, Canada and Jersey offices business community. Documented ' Risk Framework', ' Management Information' and 'Client Valuations' Reports and BRM workflow for Triple A Plus.
Project 2 Scope: DOSA (Data Owners and Stewards Assignments) and GOSA (Group Owners and Stewards Assignments).
Project 3 Scope: SWIFT (FUNDS) -Mandatory migration from ISO15022 (MT) XML Messaging to ISO 20022 (MX) XML Messaging: and FX Transaction Processing and Integration Testing.
Project 4 Scope: Client On-boarding, KYC/AML - FATCA, Project Black (Capital Market Process).

- Traced Requirements to Business and Technical Specifications, Business Process Models, High Level Architectures, Use case Models and Narratives, Test Cases and Scripts and Product Requirements using MS Word and MS Visio.
- **Reporting:** Documented business/technical and data requirements for 'Risk Framework – Performance risk and returns', ' Management Information' and 'Client Valuations' Reports (both internal and Client Reports).
- **CRIMS:** Worked closely with business in project where migrating from CRD version 8.2.2 to Version 9.
- **Project Black:** Documented capital market process (FX transactions) for systems RATS and RIMMS.
- **CRM (Customer Relationship Management)/CDM (Customer Data Management):** Authored AS-IS and TO-BE business processes to meet business needs for client information, KYC processes and end-to-end client on-boarding process and requirements (process includes client initiation, solicitation of credit approvals / facility set-up, completion of KYC, AML and hand-offs to Compliance, Legal, and Product / Account Set-up.
- **FATCA:** Documented AS-IS and To-Be Process maps for Client On-boarding- KYC/AML for all business units within in RBC. Conducted workshops with tax, operations , legal , Front office and other SME's to document the list of current documents taken from all client types for account opening and identify additional documents required for FATCA purposes for process to-be. Worked through the first phase where documented all three big aspects of FATCA – On boarding (client Screening), Withholding and Reporting to IRS (process to-be).
- **SWIFT (FUNDS)** -Mandatory migration from ISO15022 (MT) XML Messaging to ISO 20022 (MX) XML Messaging: With business community gathered current state (ISO 15022) and future state (ISO 20022) XML messages for new message library for Funds. Created a massive MT-MX mapping sheet capturing status (Mandatory/optional), Sequence, Tag, Tag content, content options, qualifier, description, Repeat, class, format and date field.
- Wrote SQL queries for reports, data mapping and data validation.
- Documented Test Plans and Test Cases/Test Scripts from the Business Requirement document and design document to cover overall quality assurance. Used HPQC V 10 for test cases repository, reporting bugs, tracking bugs and updates on resolved bugs.
- Contributed to organizational change management by facilitating robust User Acceptance Testing and supporting all training phase of project.

Environment – Odyssey Triple A Plus , Charles River Investment Management Suite , Bloomberg Terminal , UPMOST, MILVUS, Microsoft products like Word ,Excel & Visio , Testing Tools like - HP Quality Center version 10.00 , Requirement Management tool like Requisite Pro , SQL , Share Point , Project methodologies like mix of Agile and RUP, RIBS (Ganges), Equalizer, iseries, Fundsettle, Prodiance.

Lead Business/Systems Analyst – Russell Investments (Seattle, WA)
JAN 2011 – DEC 2011

Project Scope - Charles River Investment Management System – Upgrade from version 8.2.2 & version 9

- Traced Requirements to Business and Technical Specifications, Business Process Models, High Level Design, Use case Models and Narratives, Test Cases and Scripts and Product Requirements using MS Word and MS Visio.
- **Portfolio Solutions** – Worked closely with the Portfolio managers for customizing/creating views/ order management workflows at Manager's Workbench – E.g. ETF view, ABS VAR INTL: 20 bps Band, ABS VAR INTL: 50 bps Sweep, ABS VAR INTL: 5bps Band which they needed to perform their daily tasks.
- **TOMI (Trade Order Management Investment System)** - Worked closely with New York, London and Seattle Portfolio managers/traders in customizing look and feel of TOMI Dashboard.
- **Program Trading** – Restricted Trade/Corporate Actions, Round lot rules for certain Exchanges at security level for trade purposes.
- **London Rebalance System** – Wrote switching process document outlining the process of creating switch transactions by pairing subscriptions and redemptions.

- **Compliance (Portfolio Compliance, Pre- trade, In –trade and Post execution Trade compliance) -**   With compliance officers gathered requirements to set up tests at CRD so can produce alerts, warnings and data exceptions for all compliance rules, worked through the global rule library at CRD (Investments Regulations).
- **Interface** –Authored interface specifications for Russell vendors – Bloomberg, BBH, Morgan Stanley, Thomson Reuters, Goldman Sachs, Advent, OASYS, and OMGEO.
- **User Training** – Educated different user groups by conducting workshops at Seattle and London office (through WebEx) on – CRD Navigation, different modules - 1. Portfolio, 2. Trading – Blotter, Equity and Fixed Income trading, Direct Dealer Inventory, TBA Mortgage trading, Foreign Exchange and Hedge fund trading, Program trading, Crossing, Derivatives trading, Market Curves, 3. Compliance, 4. Post- Trade – Processing and Confirmations/Affirmations, 5. Security Setup, 6. FIX – Trading with FIX and FIX Operations (Wrote User guides and PPT's for all the above modules).

Environment - Charles River Investment Management Suite V 8.2.2 , Bloomberg Terminal , Advent, BBH , Thomson Reuters , London Rebalance System for currency pairing, Microsoft products like Word , Excel , Visio , JIRA , HP Quality Center, Requisite Pro , SQL , Share Point , Agile (SCRUM) and RUP Methodology.

Senior Business Analyst – Cablevision Systems (Woodbury, NY)
FEB 2009 –JAN 2011

Project 1 Scope – JCAS (Java conditional access system)
- Authored Process Models and System Architectures for Cablevision technology and Process (Legacy and New Systems - JCAS (Java conditional access system)
- Authored RFP's (Request for Proposals)/RFI's with legal & management people for different vendors for cablevision.

Project 2 – IMS and FMC (Fixed Mobile Convergence) project.
- Developed Process Models/System Architectures and documented Business and Technical Specifications ,   for Systems /projects – Legacy Interactive Video Streaming and OCAP Interactive Video streaming, Woodbury Test Labs, JAVA based conditional access systems (JCAS)
- Developed Test Plan and Schedule, test case validation authored by QA team for both legacy and new systems.
- Managed Testing efforts with HP Quality Center 10.0 such as running daily Defects reports, discussing Open defects with the development team and validation by product group.
- Contributed to organizational change management by facilitating robust User Acceptance Testing and supporting training phases of project.

Environment – MS Office and Visio , MS Access , SQL , Web logic, Requisite Pro , HP Quality Center version 9.2 and 10.0 , Serena , Share Point.

Lead Business Analyst – Metavante Corporation (Nashville, TN)
AUG 2008 – FEB 2009

Project Scope- VISA Tax payment Program -The purpose of the VISA Tax Payment Program is to ensure that LINK2GOV is prepared to provide tax transactions services in compliance with the VISA Tax Payment Program updated in June 2008.The project encompasses changes to products and products platforms as well as ensuring general company readiness involving sales, Account Management, Network Services and Customer Support.

- Documented process models and architecture for applications – Web Application, IVR, Point of Sales, and Pay2Gov Express, VPay and Multipay.
- Analyzed PAY1040 and associated state tax websites to recommend and document GUI changes for enhanced usability, and revised other business rules documentation as requested.
- Authored and implemented basic/advanced SQL queries for reports, data mapping and data validation.

- Authored detailed project plans for assigned projects. Identify and escalate issues to appropriate group, steering committee or other governing body to ensure successful implementation.
- Traced Requirements to High Level Design, Use case Models, Test Cases and Scripts and Product Requirements using MS Word, MS Excel and MS Visio.

Environment: Agile,IBM-Rational Requisite Pro, Share point, MS Office and Visio, SQL,Web Sphere Data stage, TIBCO, XML and DHTML ("Ajax"), Dreamweaver, Adobe Acrobat, UNIX, Windows.

Business and Systems Analyst – Stanford Financial Group (Houston,TX)
JAN 2008 – AUG 2008

Project Scope - North America Odyssey Implementation - "Odyssey Wealth Management Platform" implemented to SFG in order to support their investment management business vesting in 3 tier system – the front end user functionality, Portfolio Management and Administrative functions.
- Documented 'AS-IS' and 'TO- BE' business requirements for Stanford's Retail, Private and Institutional Clients.
- Documented design for the proposed WUI and GUI (odyssey) for the web application/platform. Documented entire trade flow process.
- Performed Fixed Income Analysis for Trading (Pricing, Risk, Yield, Duration, and Recommended Strategy) with Excel to support trading, and reviewed with portfolio manager and traders per their requirements.
- Worked with compliance officers in setting up compliance rules within the platform to produce alerts, warnings and data exceptions used by portfolio and trading analysts for investment purposes.
- **Reporting:** Documented business/technical and data requirements for internal and external reports – Performance Proof report, Cash withdrawals and deposits and Cash run report, Management selected period performance report, Model vs. Actual holdings report, Outstanding fees report, portfolios out of tolerance report, Transactions summary report, Client valuations report.
- **Customer Relationship Management** (CRM) -   Authored current and proposed state by interviewing financial advisors and relationship managers for designing/creating IPS , designed new account opening as well as KYC forms, compliance check and audit trials.
- **Operations and Billing Process:** Authored business and technical requirements for SCM (Stanford Capital Management) Operations, billing process and procedure with Redi 2 Revenue Manager.
- Authored and implemented basic/advanced SQL queries for reports, data mapping and data validation.
- Involved in creating Test Plans and Test Cases/Test Scripts from the Business Requirement document and design document to cover overall quality assurance. Contributed to organizational change management by facilitating robust User Acceptance Testing and supporting the training phase of project.

Environment: RUP,MS Visio, J2EE, ASP.NET, Requisite Pro, SharePoint,SQL , Odyssey – Wealth Management, Triple 'A(Enterprise data Management (Sybase)), Advent Geneva, Actuate, Net Exchange Pro (Pershing), Redi2 revenue Manager, XML, UNIX ,LINUX, ETL, Web logic, (Extraction Transformation Loading), Net Suite, Vega application Development, Laser apps, Trust 3000,Thompson Reuters, Bloomberg, Quality Center.