

# EDMUND WONG, CERT. APM

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## ROBOTIC PROCESS AUTOMATION BUSINESS ANALYST

### CORE COMPETENCIES

- Process Management: Process Mapping & Modeling, SIPOC, DMAIC, PDCA and Process Simulation
- Lean Six Sigma: A3, Gage R&R, Kaizen, SPC, TAKT, VAR, VSM and Waste & Flow Analysis
- Business Analysis: SWOT, Root Cause, Benchmarking, Flowcharting, Metrics and KPIs
- Project Management: Charter, WBS, Gantt, Network Diagrams, Make-Buy and Trade-Off Analysis
- Agile / SCRUM: Iterative, Incremental, Sprint, Stories, Backlog, Release, Velocity and Burndown
- Data Science / ML: Pandas, Numpy, Matplot, Scikit-Learn, kNN, SVM, Regression and TensorFlow

### SKILLS AND TECHNIQUES

- Change Management: Kotter's 8 Steps, Stakeholder Analysis Chart and Change Consequences
- Strategic Management: Porter's 5 Forces, Canvas Model, Strategy Mapping and Performance Plan
- Risk Management: Probability & Impact Matrix, Sensitivity Analysis and Monte Carlo Simulation
- Problem Solving: 5 Whys, Pareto, Decision Tree, Fishbone, Decomposition and C&E Matrix
- Creative Thinking: Six Thinking Hats, Mind Mapping, Affinity Diagram and Kaleidoscope
- Computer Language: Java, HTML, CSS, JavaScript (JS), jQuery, API, Python, SQL, Swift and TypeScript

### COMPUTER LITERACY

- Professional Software: UiPath, MS Visio, MS Project, SmartSheet, Creately and Wireframe.cc
- Developer Software: Xcode, Android Studio, Eclipse, Bash, VS Code, Postman, MySQL and MongoDB
- Platform / Framework: GitHub, Heroku, Bootstrap, Node, Express, MVC, PWA, Angular and React
- Analytics Software: Anaconda, Jupyter, Tableau, ArcGis, MiniTab, Simul8, @Risk and SPSS
- Financial Software: Cognos, SAP, CRM, ADP, AS/400, ThomsonONE and Bloomberg Terminal
- Microsoft / MS Office: Word, Excel, PowerPoint, Outlook, Access, OneNote and SharePoint

## PROFESSIONAL DEVELOPMENT – EDUCATION, CREDENTIALS AND WORKSHOPS

### EDUCATION

#### Coding Boot Camp, Trilogy / University of Toronto - Toronto

2020

- A 12-weeks intensive program focused on full stack development skills in HTML, CSS, JavaScript, SQL & noSQL databases, CRUD & RESTful APIs, MVC and MERN (MongoDB, Express, React & Node).

#### Graduate Certificates, University of Toronto - Toronto

2013 – Present

- Certificate in Data Science – expected on Aug 2021
- Certificate in Project Management – completed on Jul 2018
- Certificate in Lean Six Sigma – completed on Feb 2018
- Certificate in Advance Business Process Management – completed on Apr 2016
- Certificate in Business Process Management – completed on Jan 2016
- Certificate in Business Analysis – completed on Aug 2015
- Leadership Essential Certificate – completed on Feb 2015

#### Bachelor of Commerce, Concordia University - Montreal

2008 – 2011

- Major in Finance and Minor in Financial Accountancy
- Finance Streams in Corporate Finance and Derivatives

### CREDENTIALS

- PMAC Certification: Certified Agile Project Manager (Cert. APM)
- CSI Certification: Canadian Security Course (CSC)

### WORKSHOPS

- University of Toronto: RPA, Angular8 & TypeScript, iOS & Android App and Advertising
- Seneca College: Web Analytics, Online Marketing, Social Media and SEO
- Camp Tech: HTML & CSS, Illustrator and InDesign
- MaRS Discovery District: Entrepreneurship 101

## **WORK EXPERIENCE – NON-PROFIT, FINANCIAL CRIME, AUTOMOTIVE, ADVERTISING, ETC.**

### **NON PROFIT ORGANIZATION**

**2018 – 2019**

#### **Vice-President of Marketing and Communications, ABPMP Toronto – Toronto**

The Association of Business Process Management Professionals (ABPMP) is a non-profit, vendor-independent, professional organization dedicated to the advancement of business process management concepts and its practices. Nominated by the association to volunteer as Vice-President of Marketing and Communication for a two years term, my responsibilities include managing the association's brand image and providing the Chapter with public relations service; managing all internal communications for the Chapter; managing the Chapter website and databases; as well as providing the Chapter with social media, online electronic communications services and support.

#### **Key Accomplishments:**

- Proposed three months integrated marketing communication strategy to increase brand awareness and engagement through social media.
- Designed a new booklet to promote and engage potential members to know more about ABPMP.
- Managed MailChimp newsletters and social media platforms to engage current members.
- Launched the Summer Social event campaign on EventBrite and successfully increased page view by over 317% and ticket sold by 72% compared with prior campaign.

#### **Key Partner:**

- University of Toronto – School of Continuing Studies

### **FINANCIAL CRIME**

**2018**

#### **Business Analyst and Change Champion, HSBC – Markham**

Functionally working under the global Financial Crime Risk Simplification Programme (FRCSP) while reporting to the regional Financial Crime Risk Transformation team (FCRT). As a business analyst under FCRSP, our role is to communicate global initiatives to internal customers and facilitate project deployment within multiple verticals by gathering business requirements. Deployment phases include knowledge exchange between stakeholders, initiative acknowledgement in project work group (PWG) meetings, training delivery, project implementation, data collection and benefit analysis, change impact assessment request if needed and project completion approvals. As a change champion, our role is to engage and encourage FCRSP team to adopt global transformation standards on project/programme management.

#### **Key Accomplishments:**

- Co-hosted bi-weekly PWG with project manager to deliver local and global initiatives. Focused on collecting project status from PMOs of each vertical, presenting it to leadership team and facilitating stakeholders' engagement on major issues that need immediate attention.
- Facilitated the deployment of TM Case Assignment project that automatically allocates unusual activities cases to the proper investigator, resulting an improvement on average RPH from 1.12 to 1.40. Worked with global project manager (PM) to understand the requirements and then transferred this knowledge to local stakeholders, ensuring users have proper training prior to the project implementation. Weekly communication between operational manager and PM to discuss RPH results to see if any changes are required to reach the expected target.
- Lead a Credit Related Operational Loss fraud project to conduct elicitation and documentation of the current as-is process in Canada and to assess the impact of the future state defined by global team. Set up initial meeting with sponsor to clarify requirements and expectations as well as to acquire main subject matter expert (SME) contact. Reached out the SME to better understand the process and who might be involved by completing a high level SIPOC diagram. Conducted phone interviews with each departmental stakeholder (see list below) to gather information on their sub-processes and tasks. Combined all sub-processes by creating a swimlane process map and hosted a video conference call with all stakeholders to discuss the mapped process for any discrepancies and how the future state might impact.

#### **Key Stakeholders:**

- Transaction Monitoring, Financial Crime Threat Mitigation, Fraud, KYC, Sanction and Screening.
- Retail Banking & Wealth, Triage, Major & Complex Cases, Collection, Credit Risk and Fraud Oversight.

## WORK EXPERIENCE – NON-PROFIT, FINANCIAL CRIME, AUTOMOTIVE, ADVERTISING, ETC.

### AUTOMOTIVE

2016 – 2017

#### **Business Insight Analyst, Goodyear Canada – Toronto**

Under the Business Intelligence and Operations team, the business insight analyst acts as a consultant to bring new perspective to our partners by leveraging data and telling stories behind the numbers. In addition, we are actively involved in business decisions with leadership by bringing economic insights to create competitive advantage in the industry. We focus on the consumer and commercial replacement markets in both Canada and USA demographics. We bridge gaps between Sales and Marketing with Finance, Credit and Pricing departments, as well as leveraging Information Technology (IT) and Support (IS) teams. Our projects include landscape assessment, customer segmentation, business planning, economic insights, industry & market insights, growth & distribution and competitive picture.

#### **Key Accomplishments:**

- Lead several projects by applying BPM, Lean Six Sigma and Project Management methodology.
- Built a tool identifying the market potential within a salesperson's territory for both consumer and commercial side. Wrote a one-page legal size project charter, including the benefits, risks and constraints as well as a SIPOC showing the process of building the tool with assumptions made, to get Leadership to buy into the project. Reached out to internal and external stakeholders to collect data and compiled a dashboard depicting Goodyear Sales in comparison to Market Potential Estimates on a detailed level by FSA. This project was recognized by the North American team as our USA counterpart used our data to showcase their project due to the level of detailed information we were able to gather, which the USA cannot accomplish. Sample project: <http://bit.ly/2tPOFuN>
- Created departmental SharePoint sites as a communication mean to support the Sales team. Wrote a proposal on the project's vision and objectives, including a SharePoint site hierarchy design and the types of content available (work breakdown structure), to persuade Leadership to buy in. Worked closely with IS to optimize all SharePoint features and benefits, and with IT to ensure global compliance and standardization. Focused on the ease of use and familiarity while building the sites as our audiences have different skillsets when it comes to modern technologies. Sample project: <http://bit.ly/2Gyi1Ac>
- Trained the Sales on market reports and dashboards as well as how to access through SharePoint.
- Implemented process improvement for price file submission by reducing processing time from 3 people 7 days job (120 hours) to 23 minutes, thus a 2.99 FTE reduction benefit. This project consists of analyzing the process of the price file submission and creating a tool to improve the quality of the work by reducing/eliminating potential risk of errors, as well as automating the work flow with technology. Worked with the current Business Insight Analyst (BIA) in Operations to define the current process by mapping a regular flowchart, while identifying potential issues encountered in each process. Identified handoff stakeholders at middle and front line level for each BIA process and interviewed them to understand further the whole process. Compiled a high-level swimlane process map and measured process time of the current process. Identified potential improvement and included IS to help build a tool for automation. Sample project: **Available upon request**
- Involved in the AirMiles project as a business consultant to ensure alignment with business goals. Engaged with Marketing and Finance teams to assess alternative options for AirMiles after contract expiration and future plans on loyalty programs.
- Administered the G3X nomination project and collected feedbacks from stakeholders for improvements. Collaborated with Regional Sales Manager and G3X nomination administrator to test a new portal that streamlines the G3X nomination process and to provide feedback to the project manager and the IT team for further improvement. Clarified with the end user on the requirement of the project and compared the current state with the ideal state. Applied the lean six sigma's waste analysis matrix to analyze the value added of each processes as we role-played all end users providing a more comprehensive feedback. Sample project: <http://bit.ly/2pfrwNI>

#### **Key Customers:**

- BMW, Chrysler, Ford, GM, Honda, Hyundai, Kia, Mazda, Mercedes, Mitsubishi, Subaru and Volkswagen.
- Fountain Tire, Benson Tire, Atlas Tire, Market Tire, Touchette, Unimax, Midas, OK Tire and Canadian Tire.

## WORK EXPERIENCE – NON-PROFIT, FINANCIAL CRIME, AUTOMOTIVE, ADVERTISING, ETC.

### ADVERTISING

2014

#### **Account Coordinator and Financial Specialist, AMNET Canada – Toronto**

As part of the programmatic division of the Dentsu Aegis Network, our focus is on delivering performance in the digital media buying space through innovative platforms. Collaborating closely with an account manager, the role of an account coordinator involves arranging group meetings for brainstorming sessions, campaign discussions and performance reviews, setting and managing accounts, creating insertion orders and producing insightful reports. Taking on greater responsibility as a financial specialist for the division, billing activities include requesting mid-month estimates and end of month expenses, inputting revenue/expense data, preparing monthly profit/lose reports, and resolving financial discrepancies.

#### **Key Accomplishments:**

- Produced Excel templates with automated features reducing hours of work to a simple click of a button.
- Reorganized data storage and renamed filenames to match vendor platforms for familiar navigation.

#### **Key Customers:**

- Adidas, BC Government, Burberry, Corby's, Danone, Disney, Mr. Lube, Reckitt Benckiser and Subway.

### FINANCIAL SERVICE

2007 – 2014

#### **Quality Assurance Administrator, CIBC Direct Sales – Toronto**

During the closing of FirstLine Mortgages business, mortgage accounts with renewal approvals had the option of transferring to CIBC Mortgage. Quality assurance was necessary to smoothly complete the transition. Our main task was to scrutinize and to assure all mortgage agreements are accurate and error free while in compliance with regulations. The overwhelmed workload enabled to identify opportunities for process improvement, leading to the beginning of a new project.

#### **Key Accomplishments:**

- Built an Excel VBA application that allowed administrators to search information on mortgage agents, most up-to-date mortgage rates and service level agreement dates, as well as calculating mortgage payments based on complex criteria with simple selection buttons. Sample project: <http://bit.ly/2luQss7>

#### **Client Relationship Consultant, BMO InvestorLine – Montreal**

As a representative of Canada's best online brokerage, our focus on great customer experience gives investors confidence in our products. Through BMO's Customer Conversations training program, the ability to listen actively to what customers are saying enables effective resolution. Client relationship consultant in branch support is the bridge between front and back office, and it consists of three main activities: resolve issues on new account opening, account transfer, corporate, estate and trust accounts; process request for fund transfer, password reset, profile update, cheques and statements; and provide information on account status, financial products, the online platform, forms, promotions, AML rules and regulations, and the stock market.

#### **Key Accomplishments:**

- Received five consecutive achievements for customer service excellence between October 2011 and February 2012, and elected for BMO InvestorLine All-Star Nomination by the executive leaders.
- Closed a \$1.4 million sales deal on June 2012 in collaboration with our Inside Sales Representative.
- Obtained perfect score on the annual overall customer satisfaction survey conducted in July 2012.

#### **Junior Analyst Assistant, Laurentian Bank – Montreal**

Under the risk management department for corporate finance, the junior analyst assistant's main roles are to support senior analysts' administrative tasks, which includes reviewing letter of offer and standby letter of credit while carrying out reconciliation of data; monitoring corporate credit accounts and declaring non-sufficient funds; performing data entries and analyzing financial reports; reconciling between account payables and account receivables; and accomplishing administrative work and other requests from the director.