

戴昱

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教育经历

华威大学 商业咨询 硕士 英国	2017/09 - 2018/08
利物浦大学 会计与金融 本科 英国	2015/09 - 2017/06
西交利物浦大学 会计与金融 本科 中国	2013/09 - 2015/06

工作经历

花旗金融信息服务有限公司 (上海) 需求分析师	2020/10 - 至今
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➤ 监管报表自动化 - 泰国花旗银行

- **需求分析:** 基于监管机构最新要求, 匹配用户数据需求与上游系统数据字典, 构建底层数据库, 为业务提供全量数据支撑。针对潜在需求变化, 从用户友好性, 可维护性等角度设计核心业务逻辑框架。通过模拟测试验证报表规则准确性, 并输出完整的功能需求文档, 最终成功推动泰国花旗银行超 75 张监管/辅助报表自动化的落地。
- **数据分析:** 运用 SQL 提取目标数据, 并结合 Excel 进行数据清洗。从交易记录, 客户和企业等颗粒度多维度分析数据, 为业务决策提供精准的数据支持。
- **UAT 测试:** 制定计划, 分配任务, 推进团队高效完成 UAT 测试。通过 JIRA/INC 实时跟踪测试问题, 协调开发快速定位根因并推动修复, 保障问题闭环管理。每日组织跨国团队例会, 对齐进度, 讨论迭代方案, 确保系统按时部署。及时跟进生产环境的需求变更, 逻辑漏洞查询, 全方位协助用户生成并提交监管报表。
- **敏捷项目经理:** 领导 5 人敏捷团队定期完成迭代计划和评审会议。拆解用户故事并按工作量分配任务, 确保迭代准时交付率高于 95%。设计敏捷文档自动审核流水线, 保证关键文档错误率降至 0%。

中科软 (上海) 需求分析师	2020/05 - 2020/10
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➤ 汇丰人寿 E-Expense 项目

- 成功将汇丰人寿的线下费用报销及预算管控流程迁移至线上系统, 显著提升成本管理效率。
- 需求分析、JIRA 问题跟踪、需求文档编写、UAT 测试的案例编写等项目工作。
- 协助用户日常业务, 如协助筹备子公司注册申请材料及银行开户文件, IFRS17 规则分析及翻译等。

香港赛马会 (深圳) 需求分析师	2018/08 - 2019/07
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➤ 自助终端项目/快速支付系统 (FPS) /电子钱包项目

- 成功推动电子转账服务及电子钱包功能的迭代优化, 完成自助终端投注设备的系统升级, 提升支付效率及用户体验。
- 从管理终端、设备终端、数据库等维度, 拆解分析电子转账系统与快速支付系统整合过程中的业务需求, 识别核心问题并提出解决方案, 独立完成需求文档编写及 UAT 测试。

其他技能

- 商业分析工具: Python, SQL, Excel, JIRA, SNOW
- 证书: 国际特许公认会计师 (ACCA), 会计师从业资格证
- 语言: 英语 (雅思 7.0), 普通话 (母语)

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EDUCATION

Warwick Business School MSc Business (Consulting) Postgraduate	Sept 2017 – Aug 2018
University of Liverpool Accounting and Finance Undergraduate	Sept 2015 – Jun 2017
Xi'an JiaoTong-Liverpool University Accounting and Finance Undergraduate	Sept 2013 – Jun 2015

BUSINESS EXPERIENCE

Citigroup Services and Technology Limited (Shanghai) Business Analyst	Oct 2020 - Present
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- **Local Regulation Report (LRR) Automation - Thailand**
- **Business Analyst:** Lead BA team to align user data requirement with source data dictionary, and create strategic database. Design core business rules with considerations of user-friendliness and maintainability, verify rule accuracy based on simulations, and deliver FRD documentation to get sign-off. Successfully automate more than 75 regulatory/control reports for Thailand Citi Bank.
- **Data Analyst:** Leverage SQL, Excel and data management tools for data retrieval & analysis, to provide accurate data support for the project.
- **UAT Coordinator:** Oversee UAT testing and manage JIRA/INC issue tracking & resolution. Coordinate with global teams to investigate root cause on daily basis. Support production change request and bug fix.
- **Scrum Master/Project Manager:** Lead a 5-member agile team to conduct sprint planning/reviews regularly. Decompose and allocate JIRA stories based on workload, ensuring an on-time delivery rate of over 95% for all sprints. Design an automated audit pipeline for Agile documentation, reducing critical documentation error rates to 0%.

Sinosoft Company Limited (Shanghai) Business Analyst	May 2020 - Oct 2020
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- **HSBC Life E - Expense Project**
- Migrated offline expense reimbursement & budget control processes for HSBC Life to an online system, boosting cost management efficiency.
- Handled requirement analysis, JIRA issue tracking, FRD documentation, UAT testing, etc..
- Assisted Business as Usual tasks, including preparing registration documents and bank account materials for new subsidiaries, analyzing and translating IFRS 17 regulations, etc..

Hong Kong Jockey Club (Shenzhen) Business Analyst	Aug 2018 - Jul 2019
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- **Kiosk Project/ETG FPS/e-Wallet Project**
- Combined and enhanced electronic fund transfer services and e-wallet functions, hence improved payment efficiency and user experience on Kiosk terminals.
- Analyzed business requirements of integrating fast payment system and e-Wallet, and completed FRD documentation. Identified core business issues and proposed solutions during UAT testing.

SKILLS

- Business Tools: Python, SQL, Excel, JIRA, SNOW
- Certifications: ACCA (Association of Chartered Certified Accountants), Chinese Accountant Certificate
- Language: English (IELTS 7.0), Mandarin (Native)