Résumé of Mark Ferretti

MARK FERRETTI
Business Systems Projects

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SUMMARY OF QUALIFICATION:

Over 20 years' experience helping organizations achieve their vision and mission, goals and objectives, by working with executives, management, business operations, technology, SMEs, vendors, clients and customers, defining their requirements then forming and prioritizing Projects and executing them via project management and coordination, technical business analysis, applications development, and BPM continuous improvement including customer experience management, systems and process analysis, and technology integration.

I have helped organizations in a wide variety of industries including healthcare, government, manufacturing, banks, investment firms, commercial airlines, shipping and logistics, customer services and their contact centers, and the Church.

Led hundreds of projects and never had a project failure (scope, schedule, budget, sponsor and stakeholder expectations).

Certification in Project Management from Boston University. Certification in Process Improvement from International BPM Institute. Bachelor of Science in Administrative Systems from Indiana University. Master of Arts in Counseling Psychology from Colorado Christian University.

KEY KNOWLEDGE, SKILLS AND ABILITIES:

- Program, Portfolio and Project Management
- Organizational Readiness
- Systems Improvement (BPM)
- Technical Business Analysis
- PMI's Methodology, Documents, Baselines and Metrics
- Requirements, Scope (Features), Roles and Resources, Risk Management, Quality, Budget and Schedule Management
- Change Management and Change Control
- Management of projects and teams onsite, offsite and/or offshore, worldwide
- Customer Experience Management (CEM)
- Client/Customer Support
- Vendor Management
- Business-IT-Vendor Coordination, Collaboration and Communication
- Development and Implementation of today's technologies (Web, Windows, Mobile, Cloud Services, SaaS, PaaS, ERP, vendor applications and their configuration and interfaces, Client/Server, RDBMS, Mainframe and their portal technologies)
- Integrated System/Software Development (SDLC)
- Agile, Iterative Development
- Object Oriented Analysis and Design
- N-Tier Architecture: Presentation Layer, Services Layer, Database Layer
- Hub-and-Spoke Design instead of Point-to-Point Interfaces

EDUCATIONAL QUALIFICATIONS:

Business Process Management Professional (P.BPM) certification, International BPM Institute.
Process Analysis and Continuous Improvement based on Customer Experience Management, Process Analysis and Re-Design, Process Mapping and Measurement, and Organizational Strategy and Tactics.

Project Management Certificate, Boston University.
Foundations of Project Management Certificate Program. Boston University Corporate Education Center (BUCEC) was a charter Registered Education Provider of the Project Management Institute (PMI) and sat on PMI's Global Corporate Council.

Bachelor of Science (B.Sci) in Business, Indiana University, Bloomington, Indiana.
Majored in Administrative Systems with emphasis in Computer Science and Business Process Management (BPM).

Master of Arts (M.A.) in Psychology, Colorado Christian University, Lakewood, Colorado.
Graduate degree in counseling psychology. Earned this degree to better business relationships and communications.

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CAREER SUMMARY:

1. **Doctors' Office** …………………………………………………………………… 2018 - Present
   Technical Consultant (Contract)
2. **Charles Schwab Corporate** …………………………………………………….. 2017 - 2018
   Data Governance Technical Business Analyst (Contract)
3. **State of Colorado Department of Health Care Policy & Financing** ……………… 2016 - 2017
   Program Improvement Advisory Committee (Pro Bono)
4. **Grace Bible Church** …………………………………………………………… 2016
   Establish Church PMO (Pro Bono)
5. **Wells Fargo** …………………………………………………………………….. 2016
   Business Process Analyst (Contract)
6. **Card (Visa, MC, Discover, Gift Cards) Fulfillment Provider** …………............ 2016
   Systems Improvement Consultant (Contract)
7. **Frontier Airlines** …………………………………………………………….. 2014 - 2015
   IVR Technical Business Analyst (Contract)
8. **Catholic Health Initiatives** ……………………………………………………. 2013
   Applications Standardization Analyst (Contract)
9. **MoneyGram International** …………………………………………………….. 2011 - 2012
   Contact Center Senior Project Manager (Contract)
10. **Broadridge Financial Solutions** ……………………………………………… 2011
    Projects Coordinator (Contract)

⬆ Consulting ⬆   ⬇ Full-Time Employee ⬇

11. **Navis Logistics** …………………………………………………………............ 2003 - 2010
    Program Manager (FTE)
12. **INVESCO** .... 1997 - 2003
    Manager of Applications Development (FTE)
13. **Oppenheimer Management Corporation** …………………………………………… 1986 - 1997
    Lead Programmer Analyst (FTE)

PROFESSIONAL EXPERIENCE:

Doctors' Office   **2018 - Present**
Technical Consultant (Contract)

Technical Consultant for Doctors' office systems including website and Office 365 applications, email Exchange, Cloud-based files, and vendor systems.

Created and deployed website. Worked with doctors on process, technical issues and enhancements. Worked with vendors on issues.

Charles Schwab Corporate   **2017 - 2018**
Data Governance Technical Business Analyst (Contract)

Charles Schwab Corporation is one of the largest banks in the United States as well as one of the largest brokerage firms in the United States. The company provides services for individuals and institutions investing online. The company offers electronic trading for financial securities including common stocks, preferred stocks, futures contracts, exchange-traded funds, options, mutual funds, and fixed income investments. It also provides margin lending, and cash management services, as well as services through registered investment advisers.

Responsible for onboarding Schwab business areas and approved clients and vendors onto the Enterprise Securities Master (ESM) that contains corporate approved, normalized and standardized descriptive and fundamental data for every security traded by Schwab (common stocks, preferred stocks, futures contracts, exchange-traded funds, options, mutual funds, and fixed income investments).

Created a straightforward 4-step data governance process with the documentation needed to onboard applications and files to use the Enterprise Securities Master. Created an electronic document containing every Enterprise Securities Master data point (y axis) cross-referenced with every software application and electronic file using each data point (x axis), along with fundamental statistics, that is a primary document in use today. Worked with up to 15 clients at once, and one of the largest ESM consumers to date: an enterprise compliance/regulatory/fraud application.

State of Colorado Department of Health Care Policy & Financing   **2016 - 2017**
Program Improvement Advisory Committee (Pro Bono)

Voting member of the Colorado Department of Health Care Policy & Financing, Program Improvement Advisory Committee, and active member of the Improving and Bridging Systems sub-committee.

Helping the committees with project management, system improvement, and patient/provider advocacy.

Grace Bible Church   **2016**
Establish Church PMO (Pro Bono)

Set up Church Project Management Office. Church project management is much more relationship oriented than business project management which is results and profit oriented.

Worked with church leadership defining their Vision for the future of the church, developed the project management process and documents to facilitate ideas and projects to accomplish that Vision, and implemented a PMO Cloud intranet site to facilitate the project management process and house the documents in the cloud for online retrieval, editing, and history.

- Conducted meetings with church leadership (Pastors, Elders and Deacons) to define their Vision for the future of the church and the Directions (strategy) and Movement (goals and objectives) towards that Vision.
- Developed a process with church leadership entitled 'Vision in Action' that documents ideas and projects to accomplish their defined Vision/Directions/Movement, prioritizes those ideas and projects, then forms project teams to work the projects with church leadership pastoring the project teams.
- Built document templates to guide church leadership and the project teams through the project management process.
- Created and implemented the church 'Vision in Action' intranet SharePoint site allowing church leadership and project teams anytime cloud access to the project management process, documents, projects and ideas, active projects, and historical information.
- Handed off the Vision in Action intranet site and the process and documents by walking through the process with church leadership and together creating an actual active project.

Wells Fargo   **2016**
Business Process Analyst (Contract)

Member of the PRC team (Process, Risks, Controls) compiling the PRC Inventory. The PRC Inventory is the overall source of the organization's risks and the controls in place for those risks.

Developed and electronically distributed documents for discussion and approval, conducted web conference meetings with process owners reviewing their processes and sub-processes, risks and the controls to mitigate or avoid those risks, and documented the results in the PRC Inventory.

Card (Visa, MC, Discover, Gift Cards) Fulfillment Provider   **2016**
Systems Improvement Consultant (Contract)

Process analyst and system improvement consultant for a card fulfillment provider (Visa, Mastercard, Discover, Gift Cards). Hired to write requirements for their next generation fulfillment platform.

Current system utilized mostly hard-coding for their client orders with application-to-application interfaces to fulfill orders, resulting in high costs and duration to on-board new business.

- Created project plan to develop the Requirements Document.
- Interviewed key personnel in every area to determine current process, problems and errors, and subject matter experts' ideas to make the system better.
- Designed a system architecture with a central fulfillment engine that interfaces with configurable process modules that can be run independently and on-demand so order intake, production and fulfillment work can be performed according to each functional area's needs. Standardized processes, transactions, statuses, inventory, database, and procedures so the fulfillment system does not need coding changes or variance of standard process-procedures for client specific order-fulfillment requirements; practically all of the client specific order-fulfillment requirements will be taken care of using configuration files/settings.

Frontier Airlines   **2014 - 2015**
IVR Technical Business Analyst (Contract)

Frontier Airlines is a United States passenger airline headquartered in Denver, Colorado. The carrier operates flights to destinations throughout the United States and international destinations.

Technical Business Analyst in charge of working with Frontier Airlines' Reservations converting their IVR (Interactive Voice Response) system to an ultra-low-cost carrier (ULCC) paradigm interfacing with a completely new Cloud ERP passenger services system, and then transitioning the converted IVR system to a different IVR provider.

Worked with the business, PMO, IT, vendors and contractors nationwide on IVR requirements, integration architecture, project planning, schedule and status, IVR quality and troubleshooting.

Catholic Health Initiatives   **2013**
Applications Standardization Analyst (Contract)

Catholic Health Initiatives (CHI) is the nation's second largest faith-based health system with more than 83,000 employees, 80 hospitals, 40 long-term care facilities, and two accredited nursing colleges.

Applications Standardization Analyst in charge of working with IT and vendors to establish an architecture and required IT development to integrate 5 health-care systems in 60+ hospitals into the Cloud based enterprise Clinical Surveillance and Infection Control solution.

Worked with corporate and hospitals' IT, vendors and contractors nationwide to define requirements, integration architecture, required IT development with timing and costs, infrastructure sizing and costs, and the plan to onboard more than 60 hospitals and their health-care systems into the Cloud based enterprise Clinical Surveillance and Infection Control solution.

Developed an architecture to feed messages from the 5 health-care systems in 60+ hospitals into the vendor enterprise Clinical Surveillance and Infection Control solution that saved hundreds of thousands of dollars in cost and vendor development fees.

MoneyGram International   **2011 - 2012**
Contact Center Senior Project Manager (Contract)

MoneyGram International is the second largest money transfer business in the world, operating in more than 197 countries.

Senior Project Manager in charge of worldwide organizational readiness implementing and utilizing a completely new global customer services PaaS/SaaS platform. Applications included IVR, softphone, workforce

management, real-time customer contact centers' statistics, customer contact quality assurance, and customer interaction reporting system.

Worked with each business area, department, corporate location, and their outsourcers preparing them all for the new platform and software applications. Worked with the business, IT, vendors and outsourcers on requirements, infrastructure sizing, costs, applications training, configuration, familiarization, testing, organizational and workflow changes, and implementation.

Organized business operations into work streams and business areas. Assigned business leads to represent each business area. Worked with each business area to determine deliverables that must be produced/accomplished to successfully implement and utilize the SaaS system. Created project plans and met weekly with each work stream and business area to review deliverables, status, action items, issues, and risks.
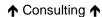
Broadridge Financial Solutions   **2011**

Projects Coordinator (Contract)

Broadridge builds the infrastructure that underpins proxy services for over 90% of public companies and mutual funds in North America; processes more than $3 trillion in fixed income and equity trades per day; and saves companies billions annually through its technology solutions.

Coordinated with clients and project teams integrating client's business into Broadridge's SaaS and infrastructure solutions. Managed project scope, project plan (tasks, resources, schedule), issues and resolution, quality assurance, implementation, client expectations and satisfaction. Managed multiple projects simultaneously.

↑ Consulting ↑   ↓ Full-Time Employee ↓

MGF Enterprises Inc   **2003 - 2010**

Program Manager

This corporation owned and operated a logistics company as part of Navis Logistics, and founded a consulting business to help organizations be more successful, efficient and profitable.

Focused organizations on improving their products and services, customer services, revenues, quality, and operational efficiencies through a program of Customer Experience Management (CEM), Business Process Management (BPM), and Software and Technology integration. Streamlined business workflows using ERP and Software as a Service (SaaS) applications. Refined business processes and operations by integrating software, technology and systems. Increased revenues through a CRM program. Assured customer satisfaction through a Customer Experience program. All of this reduced the cost of products and/or services sold while at the same time increasing business volume and customer satisfaction.

Managed the portfolios, programs, projects, and their personnel coordinating with over 200 businesses. Responsible for developing the Project Life Cycle including the processes, roles, standards, documents, toolsets, infrastructure, governance and approvals. Responsible for continuous improvement of customer experience, business processes and business operations.

INVESCO   **1997 - 2003**

Manager of Applications Development – Investment Systems and Compliance

Invesco Funds is part of Invesco Ltd., a global investment management company with over $980 billion in assets under management (September 30, 2018).

Managed the group that defined, developed, integrated, delivered, maintained, and supported all the investment systems' applications and technology. Liaison between the business and IT. Responsible for communication, coordination and collaboration with executive, business, and technical management, stakeholder satisfaction, costs and benefits, budget, hiring personnel and their career development, planning, prioritization, schedules, projects, project governance, solutions, applications, vendor software, software development, quality assurance, process analysis, ad hoc reports and trend analysis, risk management, issues and resolution, troubleshooting, support, and performance/metrics.

Chair of the Straight-Through-Processing Committee.
Member of the corporate steering committee that identified, discussed, evaluated, prioritized, and monitored projects that streamlined processes and functions in the business by integrating software and technology and refining processes. Company became an industry leader in Straight-Through-Processing automation, saving hundreds of thousands of dollars if not millions in manual processing, resulting mistakes, and missed opportunities.

Oppenheimer Management Corporation   **1986 - 1997**
Lead Programmer Analyst

Oppenheimer Management Corporation was the customer services contact center and middle/back office transfer agency for multiple financial companies and supported over 2 million accounts worldwide.

Lead Programmer Analyst was Business Analyst, Project Manager, and Lead Developer all-in-one. Responsible for the management, analysis, requirements, design, development, quality, delivery, and support of projects for their customer services and middle/back office software applications and systems. Projects included IVR (voice response system), website, Data Warehouse, and onboarding Investment Management firms and their products onto Oppenheimer's customer services and middle-back office systems.

Hired to improve Oppenheimer's project development and implementation success. Led more than 100 projects and their teams and never had a project failure. Helped bring their customer services and middle/back office operations up to industry award-winning levels 7 years of my 10-year tenure, the company having no industry awards prior.

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