

ADAM SANDLER

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SENIOR BUSINESS ANALYST / PROJECT MANAGER

~ BUSINESS PROCESS IMPROVEMENT ~ APPLICATION ARCHITECTURE DESIGN ~ PROJECT LEADERSHIP ~

Highly accomplished Senior Business Analyst / Project Manager with a verifiable track record of managing complex IT projects and exceeding expectations. Practiced in clarifying business requirements, performing gap analysis between goals and existing procedures/skill sets, and designing process and system improvements to increase productivity and reduce costs. Extensive experience in the implementation of Financial Accounting, CRM, Employee Relationship Management, and Partner Management systems for financial services firms. Strong interpersonal skills, highly adept at diplomatically facilitating discussions and negotiations with stakeholders. Recognized project management skills, consistently deliver complex, large-scale projects on time and within budget. Additional areas of expertise include:

- Process Analysis & Redesign
- Management of Cross-Functional Teams
- Project & Delivery Methodologies
- Project Management & Tracking
- System Solution Architectures
- Change Control Management
- Budgeting & Planning
- Cost & Resource Estimates
- Project Risk & Scope

PROFESSIONAL EXPERIENCE

SOLUTIONS ARCHITECT

JUL 2000 – DEC 2002

SIEBEL SYSTEMS ✧ NEW YORK, NY

One of a select group of individuals assigned to large complex engagements designing application architectures and improving business processes for integration of Siebel systems with existing client systems. Specialized in financial services clients leveraging extensive experience in banking industry. Assigned to special “Red” accounts indicating troubled or highly sensitive projects.

Demonstrated skills in interviewing business and technical leaders to gather and clarify business requirements. Developed CRM Strategy and Roadmap vision, and oversaw Business Process and Technical mapping. Authored detailed project/deployment plans and schedules. Took lead role in numerous projects and consistently exceeded customer expectations. Earned Siebel Customer Certification by senior management of major client, PNC Bank. Siebel Customer Certification serves as an independent validation from a client that a Siebel employee was critical to their success. Gained Certification in Siebel 2000, Siebel 7 Applications suite, and Siebel 7 Analytics.

Notable Projects include:

- **CRM Strategy Project Manager** – *Siebel eInsurance strategy development for MetLife.* Delivered a CRM strategy and roadmap to MetLife’s senior management, under a Tom Siebel led initiative to assist MetLife in transforming the company’s sales and service operations. Managed cross-functional team of Sales, Services, and Product Marketing personnel to evaluate existing technologies and business processes. Final presentation highlighted areas in MetLife’s business where Siebel best practices could transform operations.
- **CRM Strategy Analyst** – *Siebel eHealthcare strategy development for Horizon Blue Cross / Blue Shield.* Developed the application architectural vision for marketing, enrollment, maintenance and renewal operations. Analyzed and documented system and business workflows, designed improvements based on industry best practices and authored CRM Strategy document presenting ROI of new process flows and integrated Siebel solutions.
- **CRM Strategy Project Manager** – *Siebel Financial Services roadmap for The American Stock Exchange.* Oversaw development of new CRM strategy for the American Stock Exchange as the AMEX was being divested from the NASDAQ and have become dependent on NASDAQ’s CRM system. Directly engaged with AMEX sales force to assist in improving sales process. Presented findings to top C-level executives and helped close sale.
- **Engagement Manager** – *Siebel Financial Services deployment at Fleet Boston Financial.* Oversaw deployments across several lines of business for Siebel Financial Services, Employee Relationship Management, and Call Center applications. Managed multiple projects valued at \$3.5M across numerous locations. Launched and managed Center of Excellence to ensure a sound architecture, track progress, and stay true to CIO’s long-term goals.
- **Project Manager** – *Siebel Financial Services Implementation at PNC Bank.* Managed critical \$11M project directing a 20-member team including resources from Siebel, several subcontractors, and assigned client resources for a 4,000-seat implementation of Siebel Financial Services suite. Highly visible project as this was Siebel’s first implementation on an IBM mainframe. Challenged by tight deadlines, stepped into several roles, such as quality assurance liaison, during peaks in product development lifecycle. Achieved high level of customer satisfaction resulting in client volunteering to be a reference for product and Professional Services.

SENIOR CONSULTANT
ORACLE CORPORATION ✧ **NEW YORK, NY**

Senior consultant, specializing in Oracle's Financial Accounting Applications for Financial Services Firms in Banking, Investment Banking, and Insurance sectors. Assigned to engagements based on demonstrated skills in business analysis, project management, and customer relationship management. Additionally chosen to lead educational seminars for clients.

Notable Projects include:

- **Project Manager** – *ERP implementation for Canadian Subsidiary of Merrill Lynch.* Assisted in global unification effort for Merrill's General Ledger system. Assumed project responsibility for full financial suite (GL, AP, AR, and Fixed Assets) rollout in Canada. Managed \$6M budget and coordinated migration/integration of Canadian accounting procedures consistent with global reporting standards. Delivered project on time and under budget.
- **Project Manager** – *ERP Y2K testing at Merrill Lynch.* Managed Y2K testing on heavily customized ERP application. Project responsibility included 30 cycles of testing with interfaces feeding data from legacy systems and other third party software.
- **Team Lead** – *ERP rollout at ING Barings.* Led financial application module rollout for enterprise-wide project. Managed all phases of project from requirements gathering through user acceptance testing and documentation development. Presented project status in daily briefings to Bank CIO.
- **Business Analysis Lead** – *Pre-Sales opportunities at Insurance companies and Banks.* Worked on several rapid Proof of Concept projects in pre-sales engagements including a B2B procurement application. Collaborated closely with sales force and prospective clients to assess needs, acquire data and configure products to prospect's needs.

CREDIT RISK ANALYST / ASSISTANT VICE PRESIDENT
NATIONSBANK ✧ **NEW YORK, NY**

AUG 1997 – SEP 1998

Senior analyst responsible for conducting credit underwriting of new international business.

- Developed financing options for leveraged clients using asset based and accounts receivable financing models.
- Expanded regional high risk lending by 45%.

COUNTRY RISK ANALYST
MELLON BANK ✧ **PITTSBURGH, PA**

AUG 1995 – JUL 1997

Researched and prepared macroeconomic analysis of Asian and Middle Eastern Economies. Accountable for underwriting foreign institutional risk and trade finance analysis. Managed commercial bank risk portfolio in excess of \$18 billion.

- Established internal risk ratings for Sovereign and Institutional risk for bank. Coordinated product rollout effort in Southern Asia for Trust and Commercial Banking divisions.
- Led effort to keep Mellon out of the Asian bank crisis of the mid '90s. Where other banks were pumping more money into S.E. Asia, provided detailed analysis supporting withdrawal position.
- Helped reestablish Mellon as a name in Asia resulting in development of very close ties with Japanese, Korean, and Australian banks for co-branding/marketing of Dreyfus products overseas.

CONTROLLER / CFO
THE ABC CONCERN (USA) ✧ **NEW YORK, NY**

JUN 1991 – APR 1993

Managed the North American office for an Asia based garment and textile manufacturing company. Oversaw \$7M operation and provided strong fiscal leadership in managing cash, costs and risk.

- Led management negotiations with asset based lenders, including major factoring institutions.
- Established financial management standards and implemented a computer based inventory and accounts receivable tracking system.

EDUCATION & CREDENTIALS

Master of Public and International Affairs ✧ International Finance & Economics, University of Pittsburgh

Advanced Certificate in Asian Studies ✧ University of Pittsburgh

Bachelor of Business Administration, Management ✧ Kent State University

Additional Coursework:

Information Systems Management, CASE Tool Management ✧ Columbia University

Certificate in Managing Information Technology Projects ✧ The George Washington University

Chairman, Technology Committee ✧ The Kerr Museum, Pittsburgh, Pennsylvania

Board Member ✧ Carnegie Mellon University Center for Strategy Simulations