

Certified Wall Street and Technology Professional 1 of 5

Mike Holman

EDUCATION

Bachelor of Science degree, Professional Technology Studies - Internet E-Commerce
PACE UNIVERSITY, **Seidenberg School of Computer Science and Information Systems** New York, NY

Associate of Science degree - Technology Systems
PACE UNIVERSITY, **Seidenberg School of Computer Science and Information Systems** New York, NY

Global Knowledge: [Business Analysis Essentials](#), [Business Process Analysis](#), [Requirements Development, Documentation, and Management for IIBA CBAP](#) via BABOK and [Project Management Fundamentals](#) for PMP via PMBOK

PRODUCT SUMMARY

Technologies: VLAN, VOIP, RSA Archer eGRC, SharePoint, Databases (MS Access, MY SQL), Qlikview, Business Objects WEBI used by Social Solutions in their Efforts To Outcome (ETO) Application, SAP, Webi, Deski, BOXI, MicroStrategy, Oracle JD Edwards EnterpriseOne (JDE), MS SharePoint, Lotus QuickPlace, Facebook, Twitter, Blogger, Drupal, WordPress, Google AdWords, Google Analytics
Financial Products: Money Market Deposits, Derivatives, Repos, Fixed Income, Equity, Municipal Bonds, FX, Global and Domestic Back Office Operations, Middle Office and Front Office Support of Trade Finance Settlement, Cash Settlement, Income, Corporate Actions, Securities Lending

PROFESSIONAL EXPERIENCE

Marketing and Sales - Operations Analyst

CCA Consultant at PricewaterhouseCoopers, New York, NY

September 2016 to Present

- Downloaded Master **Work Breakdown Structure (WBS)** data from **SQL Callidus** online Database and imported data into MS Access Database. Ran queries for Table updates. Imported new **XLos WBS** Code data into **MS Access Database**. Exported results to **MS Excel** formatting data and importing new data into **SQL Database**.
- Imported **Client Relationship Executives** Contract information for all Regions into the **Lotus Notes Database**. Downloaded all open cases for **Credit Approval Case** Report for the New York Regions. Exported firm Directory from Lotus Notes for review. Performed Review of **Google Groups** and assigned members for updates as needed. Ran queries on Partners worldwide from the **Lotus Notes Database** as well as the **SQL Callidus Database**.
- Deleted and/or Inactivated **Client Assignments** for Cases as needed from the **SQL Database**. Combined numerous **MS Excel** Reports into on master file. Ran queries on the **SQL** and **MS Access** Database for missing **WBS codes**. Created **MS Excel Macros** for various Database reports.
- Performed preparation of **PCS Statements** for Quarterly Review.
- Redesigned numerous **Global Finance System (GFS)** Reports from the old format to the new format online, identifying and reporting differences in new format with WBS Codes summaries versus individual Line Of Service counts
- Used **SAP BEx Business Objects Explorer** built into MSEXcel to create reports and eliminate Line Of Services differences. **Business Explorer** allowed for number task to be done efficiently all with MS Excel exclusively
- Monitored Message Transmissions of the **On Demand Integrator (ODI)** of data data which uses **Oracle, Informatica, FTP and SSH** from **Callidus** to the **Global Finance System (GFS)**
- Maintained the Marketing & Sales Ops Data & Reporting Table of Contents on Google Drive with Links to documents
- Completed tasks on the **Global Portal** project and decreased time by converting two very large **MS Excel** files, which combined exceeded the application limits, into one **MS Access Database** performing **MS Access** queries as needed

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Data Analyst (Contract)
1199SEIU, New York, NY

October 2015 to September 2016

- Analyzed Data on various Campaigns by building an MS Access Database to run Queries via SQL/VBA and Reports for data counts and complete information on Registered and Non Registered Health Care Workers along with full contact information for each worker. Maintained a database for each Agency who employed these workers with their contact information. Imported NPI Data info into created MySQL Database at <http://www.npi-db.info/db> for further review of all NY Data versus data already within the MS Access Database. Used NPG VAN to setup users, import bulk report and run analysis on Agency and Worker data.

Global System Administrator (Contract)
Colgate Palmolive, New York, NY

February 2015 to October 2015

- Administered Consumer Relationship Management for the **Global Consumer Response System (Global CRS)** which captures Consumer feedback via Social Media (Facebook, Twitter, LinkedIn, etc.), Web Contact Us Page, Phone, Chat and Email within **Global Consumer Affairs** provided by the Vendor Of choice, **Wilke Global**, along with related **Security and Master Data Management** processes to ensure optimization for the Global users. Personally processed over nine hundred and seventy five **Metadata Change Request (MCR)** updates to Global CRS to correct data related to the Global Users in Latin America and other Regions. Helped ensure validation fitness of Global CRS worldwide while assisting with the expansion of technical capabilities. Assisted the Technology Analyst with delivering process and workflow improvements. Helped fulfill ad-hoc and validated reporting requirements such as the Monthly Sales Module Reporting with comparison of Database existing Products to the same Products produced by the **SAP** program. Obtained membership within the **Society of Consumer Affairs Professionals (SOCAP)** to keep abreast of the latest trends within the Consumer Affairs Community.

Analyst (Contract)
Related Companies, New York, NY

September 2014 to January 2015

- Within the **Accounting Group** assisted with **Financial Planning and Analysis (FP&A) Data Analysis** projects using **MS Excel Pivot Tables** and **VLookups** to create Consolidated Reports for **Travel and Expense (T&E), Telecom, Inventory and Human Resource Management**. Studied System training module inclusive of testing for **JD Edwards EnterpriseOne system (JDE)** which serves as the firm's **Global Customer Relationship Management System (CRM)** for contacts, **Journal Entries, HR, Accounts Receivable** and **Accounts Payable**. Performed analysis on **Real Estate Vendor Waivers** for various Projects and **Billing** amounts to verify payments made. Performed Analysis relative to Related **Entity Names** and Levels within the organization to maintain consistency with **Human Resource** database. Performed Analysis related to **Telecom Carriers** statements to analyze billing usage firm wide to maintain accuracy with Vendor Billing and Internal Consolidated Billing. Performed **Travel and Expense** Analysis related to **Credit Card Vendor** and Internal Billing System (Tenrox) for Domestic and Global to ensure accuracy with **Currency Foreign Exchange Rates** received from Vendor vs average market currency rates.

Senior Data Analyst (Contract)
Citigroup, New York, NY

January 2014 to August 2014

- Within **Regulatory Reporting** within the **Derivatives** space, as **The Project Lead**, created from the ground up a **SharePoint Site** for utilization by the **Risk and Finance** Teams for review of **Notional Analysis** surrounding various Product Processor systems as Oasys, S2, RRAI, Treasury, etc using Business Intelligence tools such as **Qlikview, Business Objects** and **MicroStrategy**. Used **MS Excel** to create **Derivative Sub Instrument** Reports via **Pivot Tables** and **VLookups**. . Performed data analysis with regard to client requests and developed rules and methodologies for effective data management. Assured the integrity of project data, including data extraction, storage, manipulation, processing and analysis.

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Desktop Support and Facilities Administration, (Contract)
Emerge212, New York, NY

August 2013 to January 2014

- Created MS Excel BandWidth Usage Reports using Pivot Tables to determine appropriate usage by Tenants. Efficiently handled logistics and coordination for the Emerge212 Centers, as it relates to all aspects of technical and network (Virtual Local Area Network / VLAN / Routed IP / Public IP (Router On A Stick) / Voice Over Internet Protocol / VOIP, Voice Portal / Self Provisioning / Voicemail / Hunt Groups / Voicemail via Email) functionality/ support via the use of the fully Automated and Advanced Systems of the key Vendor WUN Systems. Simultaneously supported the Emerge212 infrastructure as well as ensure that all systems for both tenants of Emerge212 are running smoothly.

Business Analyst, (Contract)
SONY, 550 Madison Avenue New York, NY

July 2013 to July 2013

- As an **RSA Archer eGRC** Admin, setup new users. Using **MS Excel VLookups** and **Pivot Tables**, created as well as Uploaded **Processes, Sub Processes, Controls and Questionnaires**. Worked on Migration from Legacy Socrates System to the New **RSA Archer eGRC** Platform, comparing data in the Legacy System to the New Systems for Accuracy, reporting back to Manager.

Student
[Global Knowledge Training](#), New York, NY

March 2012 to June 2013

- Coursework in: [Business Analysis Essentials, Business Process Analysis, Requirements Development, Documentation, and Management](#) and [Project Management Fundamentals](#)

Business Data Analyst (Contract) (Work moved to Mumbai, India),
JP Morgan – Treasury & Securities Services (TSS), New York, NY

April 2011 to February 2012

- As **The Project Lead**, Built **MS SharePoint** sites and sub sites for Global Collaboration (Files, Calendars, Messaging, etc.) of Work with User Administration responsibilities.
- **Creation of various SharePoint Sites, Data Population and User Access Management**
- Daily using **Business Objects Enterprise Data warehouse, MS Excel, Pivots Tables**, etc. across **Trade, Cash, Corporate Actions, Income and Securities Lending** product lines, personally identified gaps in Security Identification of TBA Securities causing incorrect data to be reported for years to numerous large client across various sectors. The correction will result in more accurate reporting by teams in Mumbai and New York.

Finance and Accounting Analyst, (Contract)
JP Morgan – Investment Bank, New York, NY

June 2010 to April 2011

- Assisted Business Management for the Investment Bank's Finance and Business Management Group in reporting on Prime Brokerage/Equity Finance, Broker Dealer Services, Global Futures & Options and OTC Clearing lines of business as it related to Business Cases, Headcount Productivity, Booking of Project Time/Expense, Open/Closed Requisitions and Yearly Plan Reporting bringing report such as the Missing Time Report from 50% to 100% efficiency to accurately account of time and expense using Business Objects **Enterprise Data warehouse** Reports.

Student
[Global Knowledge Training](#), New York, NY

January 2010 to May 2010

- Coursework in: [Business Analysis Essentials, Business Process Analysis, Requirements Development, Documentation, and Management](#) and [Project Management Fundamentals](#)

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Business Data Analyst, (3 Month Contract)

October 2009 to December 2009

Morgan Stanley New York, New York, NY

- As part of the Enterprise Services Business Unit, reviewed the exported Vendor Invoice Data Files created using **Business Objects XI R3 Enterprise Data warehouse** and further created **MS Excel Pivot Tables** and **VLookups** to validate Vendor invoices against the firms Web based Vendor Management System confirming accuracy of category expenses to mitigate firmwide **Risk. Assisted in decreasing Risk Levels by Fifty Percent**
- Liaised with Sourcing Reps to confirm Business Unit Owners, to determine appropriate risk level to firm as part of the Preliminary **Risk Assessment. Successfully categorized over One Thousand Items.**

Student

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May 2009 to September 2009

[Global Knowledge Training](#), New York, NY

- Coursework in: [Business Analysis Essentials](#), [Business Process Analysis, Requirements Development, Documentation, and Management](#) and [Project Management Fundamentals](#)

Operations Risk Technical Analyst, (3 Month Contract)

February 2009 to April 2009

The Federal Home Loan Bank of New York, New York, NY

- Participated in FHLBNY process reviews relative to security identifier systems issues with **Money Market, Derivatives, Repos, Fixed Income, Equity, Municipal Bond** and **Securities Lending**
- Completed the **Business Objects Data Insight** Training offered by **SAP** for the Operations Risk Team to ensure various department data was accurate when compared against business rules and was included in the overall Data Quality Methodology. This assisted in **Risk Assessment** relative to integrity of customer data.
- Improved efficiency by decreasing Ops Risk Team processing time by **Fifty Percent** using **MS Excel defined names** along with **pivot tables** of **Business Objects XI R2 Enterprise Data warehouse** User Activity Reports from weeks to hours

Strategy Support Specialist and Senior Coverage Officer (Full Time)

June 2006 to January 2009

JP Morgan, New York, NY

- Built **Lotus Notes QuickPlace** (succeeded by **MS SharePoint**) sites for Global Collaboration (Files, Calendars, Messaging, etc.) of Work with User Administration responsibilities.
- **Liaison between the internal business groups and technology product teams to meet requirements.**
- Responsible for overseeing timely **GL, Trade Finance Settlement, Cash Settlement, Income, Corporate Actions** events of **Fixed Income, Equity, Money Market Deposits, Derivatives, Repos, Municipal Bonds** products and **Securities Lending**
- Reduced processing time for the Finance and Market Products Securities Lending using **MS Excel Pivot Tables, VLookups** and **MS PowerPoint** reports by **Seventy Five Percent** going from days to minutes by implementing **Business Objects XI R2 Enterprise in UAT/PROD**

Custody Officer (Full Time)

April 2002 to June 2006

The Bank of New York, New York, NY

- Responsible for overseeing timely **Trade Settlement, Cash Settlement, Income, Corporate Actions** events of **Fixed Income, Equity, Money Market, Derivatives, Repos, Municipal Bonds** products and **Securities Lending** leveraging **MS Excel Pivot Tables** and **VLookups**.
- Enhanced the Client Service Team processing time from weeks to minutes using **Crystal Reports** GUI for Analysis of **STP Client Report Card**, allowing for prompt delivery to the client and identification of potential problematic markets
- Daily monitored Client exposure working with the **Compliance Officer** to mitigate risk relative domestic and international currency balances and obtaining necessary Credit Officer Approvals as needed.

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Training Specialist (Full Time)

March 2001 to March 2002

Depository Trust and Clearing, New York, NY

Delivered Training to the Financial Community, promoting awareness of DTC and NSCC core products. Maintained proficiency in DTC/NSCC core products such as Problem Resolution, Reconciliation, Deposits, Withdrawals, Reorganization (Corporate Actions), Settlement, Dividends, Continuous Net Settlement (CNS) and Automated Customer Account Transfer System (ACATS). **Management (CRM) Peregrine Incident Tracking System.**

Selected accomplishments:

- Received company Rewards and Recognition certificate for excellence in handling the project management function of the roll out of the Financial Community Focus Workshop working with project managers.
- Received a company Reward and Recognition certificate for participation in a special Task Force that identified and resolved problems in dealing with online (PINS) and Call Center inquiries (logged on Peregrine Systems) from the financial community.

Training Specialist (Full Time)

December 1998 to March 2001

The Bank of New York, New York, NY

Assistant Treasurer and Training Specialist of internal and external customers in the U.S. and Europe on Banks Domestic Operations/Systems (ASP, TAS, FRB, MBS, Money Market, Fixed Income and Government versus Security Master CUSIP information) and Global Operations/Systems (GSP, IMMS and EuroClear versus Security Master ISIN information).

Selected accomplishments:

- Personally trained the newly acquired Royal Bank Of Scotland/BNYE Group.
- Designed training program on effectively implementing company's On Demand Report system designed to improve delivery of historical data information to customers.
- Designed Microsoft Access 2000 Database to track all participants in the Training Programs and Designed Query Reports for Monthly statistics and Trend Analysis.

Assistant Treasurer (Full Time)

May 1988 to December 1998

The Bank of New York, New York, NY

Investment Manager Services Dept.

- Served as Global Account Officer. Placed inquiry on Failing Global Currency and Security trades to offices in London and Belgium. Requested Foreign Exchange transactions as needed. Sent Global Customer daily Reports on Failing Global Trades and Nostro Exceptions. Reported Customer Over limit Exceptions on Global Currency Credit Lines. Corresponded with Customers and Global Operations in New York, London, Brussels and Asia via phone and online Lotus Notes Server and Workstations.
- Served as an Domestic Account Officer in Investment Manager Services. Investment Liaison between Customers Investment Managers and Bank Administration Run daily Online DTC Reports to confirm broker instructions to customer confirmations. Inform Securities Lending Administrator of customer requests to sell Securities that are on loan, so Administrator can call back the loan. Notify Investment Manager of various Corporate Actions (Called Bonds, Tender Offers, elections, etc.) and receive Investment Manager decision on Participation if needed.

Foreign Exchange Support Dept.

- Supervised Multi-Agreement Processing Unit (MAP) staff. Saved Foreign Exchange Department over \$20,000 monthly through Process FX Automation, saving time by eliminating the need to use manual tickets as items were processed directly on the system. Designed Global Trading Flow Charts with work flows for various departments outlining flow of work from Trading Front office system to Back Office main frame operations system. Compared System Specification of SWIFT transmissions to actually system-generated transactions received. Processed Foreign Exchange Transactions. Handled FX confirmations via phone and Reuters. Checked customer FX Credit Limits. Processed Foreign Exchange Options, Swaps, Spot, forward, and Compensation deals. Processed transactions relating to Offshore Funding and Grand Cayman. Process funds Transfer transactions. Processed all transactions using CICS mainframe as well as Client/Server. Monitored System Status on VAX/MBX Terminal