

RICHARD BACH, MBA

1234 Park Avenue South, New York, NY 10021 • 917-123-4567 • bach@email.com

SENIOR OPERATIONS & PROJECT MANAGEMENT EXECUTIVE Strategy Development | Business Process Management | Technology Integration

Outcome-focused retail, commercial, and private banking operations executive with 28 years of in-house and client-facing experience consolidating and repositioning corporate strategies to improve profitability. Expertise leading multi-million dollar initiatives, aligning operations with business strategy for financial institutions ranging from \$6B to \$4T in assets. Management of up to 90 people and budgets up to \$30M.

Expertise across all lines of business, developing go-to-market strategies, designing sales delivery models, streamlining operations, and selecting and deploying information technology solutions. Known for integrating change, devising collective solutions that leverage business drivers and incentives.

CAREER CHRONOLOGY

NAME WITHHELD, New York, NY2001 to present
One of the world's largest professional services firms.

Director, Financial Services Group

Hired by ABD Associates, LLC to lead client strategy, process, technology and change management projects. Retained on PWC acquisition to principal roles across engagements for banks with assets of \$8B to \$2.3T.

Project highlights:

- **Top Four U.S. Bank: *Business Banking Operating Model***: Performed segmentation to identify customers best served in another channel and market analysis to optimize bankers' geographic placement. Directed nationwide customer and non-customer focus groups and quantitative surveys to validate Customer Value Proposition.
- **East Coast Regional Bank** (\$80B assets, 12,575 employees): *IT and Operations Review*: Identified \$10M annually in process improvements and implementations, and \$3M in annual new fee income opportunities.
- **State Bank** (\$28B assets, 140 branches, 6,000 employees): *Teller Workforce Management*: Reduced teller FTE 10%; identified and implemented process and technology changes to gain teller line efficiencies of \$400K annually; and implemented segment-based fee collection approach and teller training, increasing fee collections by \$970K annually.
- **Private Bank** (\$7B assets, 1,100 employees): *Client Service Review*: Inventoried and assessed customer and back-office processes at seven client service offices for potential automation, standardization, centralization, or transfer to other departments. Created business / staffing model to support anticipated growth and rationalize optimized resources.

J.P. MORGAN CHASE & CO, New York, NY1994 to 2001
Sixty countries, \$2 trillion in assets, largest capitalization and third largest deposit base in the United States.

E-Business Systems Consultant

Managed technology and business project teams serving 800 staff in New York, NY, and five other sites, daily facilitating 14,500 customer calls and 7,2500 e-mail queries.

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