

# Lori Sternthal, PMP

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## Project Manager/Senior Business Analyst

PMP and Senior Business Analyst and with extensive experience providing solutions for insurance systems and financial service systems. Unique ability to bridge the gap between the technical side and client side to uncover requirements and provide effective business solutions. Possess communication and people skills that enable me to effectively interact with the internal business and IT groups to fully understand needed requirements and provide systems that meet those needs. Experienced working with all levels of management, global virtual teams to collaborate and implement solutions.

Business process mapping  
Data flow analysis  
Vendor Management

Client Facing  
User Training  
Quality Assurance

Data Warehousing  
System Dev. Life Cycle  
Agile Methodology

## Professional Experience

### Softworld Inc, Contract Consultant for Perr&Knight Consulting, NJ – Project Manager

11/2016-5/2017

- Project manager of new and growing product line Statistical Reporting Solutions. Created and implemented project management structure including client communication, project plans, daily stand-up calls
- Managed projects that are data related **SQL/ETL** conversions to move and stage data, apply rules for specific processing within the Operations and Technology Consulting practice
- Responsible for overseeing 5 data conversion projects in **Agile** environment from statement of work to implementation. Projects required careful attention to detail and adherence to transparency with each client
- Utilized MS Project to develop plans to track and manage through execution, negotiated resources, and worked in a client-facing environment. Worked within all levels of management, both internal and external, utilizing outstanding communication skills to fulfill project requirements

### Robert Half Int'l, Contract Consultant for NAIC, NY – Senior Business Analyst

6/2016-11/2016

- National Association of Insurance Commissioners ( NAIC ), Securities Valuations Office ( SVO ) of the Capital Markets & Investment Analysis Office, implemented the VISION ( proprietary ) system which is a valuation of securities online application critical to state insurance regulators, NAIC staff and insurance companies
- **Agile** environment, aligned with the implementation and data conversion schedule, as a trainer for the credit analysts, created training PowerPoint materials, training scripts, user guides and cheat sheets which mapped the current and future data conversion items
- Generated data analysis documentation to transition historical analyst credit files to the new system. Conducted numerous training sessions for New York & Kansas City staff on how to complete NAIC designations of securities after their credit analysis; provided ongoing 1-1 training and application support as needed

### Silver Search Inc, Contract Consultant for KPMG, NJ – Senior Business Analyst

2/2016-3/2016

- Support team in an **Agile** environment with documented business requirements including high level Visio diagrams and data mapping for **QlikView** Business Intelligence ( BI ) dashboards providing data visualization, guided analytics; reporting for Risk Management Applications user community to help firm comply with risk management policies and regulatory requirements

### Arch Insurance, Staff position, NJ - Senior Business Analyst

11/2012-11/2015

- Implemented policy administration solution (vendor system CSC) full life cycle that enables underwriters to quote/bind/issue policies and endorsements for **Excess and Surplus Property (P&C insurance) (AOP, B&M, Earthquakes, Flood, Wind, TRIA)**

- Provided end-user support, troubleshoot and documentation. Created Business Requirement Documents ( BRD ) to incorporate end-user changes resulting in enhanced form management & rating models that simplified workflow & improved productivity
- Utilizing **SQL** to reconciled premium and commission between Data Warehouse and policy administration underwriter system; collaborated with Data Warehouse IT team on resolution of production issues. Responsible for ensuring underwriting system correctly interfaces with multiple downstream & upstream systems. With QA on unit testing and test cases; managed issues list with vendor

#### **IT Contract Consultant, clients include:**

##### **AIG Insurance (Chartis), NJ - Senior Business Analyst**

**2/2010-9/2012**

- Managed, enhanced and provided user support for policy administration solution (vendor Cover-All iWorks) for **Management and Professional Liability Insurance (Executive Assurance)** for Private Risk Protector & Not for Profit.
- Elicit and mapped requirements for full life cycle policy administration solution implementation and corporate re-branding with compliance, management and underwriter's communities
- Crafted business requirement documents, forms, interface mapping document, workflow for Directors & Officers, Employment Practices, Fiduciary, Crime and Kidnap/Ransom
- Developed Data Warehouse quality mapping reconciliation processes, QA test cases, managed UAT/issues lists, ad-hoc reports, vendor management, user training and documentation, customer production support underwriter/operations; sunset activities

##### **Thomson Reuters, NY – Project Manager / Business Analyst**

**10/2009-12/2009**

- Backfill role, Order to Cash workflow – Billing/Collections enhancements; UK VAT tax

##### **Comprehension Publishing, NJ, BA, Conducted study for new online product**

**6/2009-8/2009**

- Led Joint Application Design ( JAD ) sessions; Documented product/system requirements

##### **Montclair Art Museum, NJ, BA, Conducted study of retail+ticketing management systems**

**3/2009-5/2009**

- Led JAD sessions; documented requirements/workflow processes; researched other vendors

#### **Invesco, Staff Position, New York, NY - Project Manager/Senior Business Analyst**

**1990-2008**

Held positions of increasing responsibility at Invesco, a global leader in institutional investment management with AUMs of \$500 billion.

Knowledge in Fixed Income Bank Loans, High Yield, Emerging Markets, Investment Grade CDS, Equity Trading/Research.

##### **Business Analyst**

- Elicited business requirements from core business units via Joint Application Design ( JAD ) sessions, "Not just a note taker"; Engaged in IIBA BABOK practices and principles
- Effectively worked with the stakeholders, business and development teams using Agile/Scrum, Software Development Life Cycle ( SDLC ), RUP, Waterfall methodologies
- Created Functional Requirement Document ( FRD ) in Use Case format for QA team; gap analysis, amended/approved test cases
- Skilled at analyzing business needs and document business and technical designs (Data Warehousing)

##### **Project management / PMO / User Training / Documentation**

- Engaged in PMI PMBOK practices/principles in project management coordinated with PMO committee for project approval; project charter; scope documents; Communicated weekly updates, Gantt charts, milestones to stakeholders; monitored software releases with change management and SOX with minimal post-production issues. Created user training docs resulting in lower volume help desk calls

##### **Project Manager / Business Analyst–Fixed Income Investment Applications**

**2000 – 2008**

- Managed, implemented, documented and supported web **SharePoint/ASP.NET/VB/SQL Server** systems providing trading, compliance and research commentary to the Bank Loans group; Part of Fixed Income Task Force - designed, document interfaces/processes, UATs, Documented project charter, test plan/cases, one page training cheat sheets; Managed Sybase/PowerBuilder portfolio management, account/operational management, Market loan/bond XML Pricing feed, Moody/S&P ratings feeds; Compliance MS Access reporting to **Bank Loans/Investment Grade**; FI Front/Back Office users
- As **Consolidation Team Leader, migrated a New York datacenter** to a centralized 24/7 global datacenter in Houston, contributed to a \$22 million cost saving; Per the directive of senior management, selected to lead the New York project, worked cross-functionally with a team of development, infrastructure and business stakeholders; Re-engineered, planned and designed the migration of business processes and systems with best fit practices into the centralized global data center; Engaged the team to comply with the regulated change management process; The migration was completed on time and on budget ( \$1.2 million ); Recognized by senior management for the success migration and promoted to additional responsibilities

##### **Application / Production / QA Team Lead**

**2004 – 2006**

- Led BA team, monitored change management with **Sarbanes-Oxley ( SOX )** regulations, troubleshoot/resolved production overnight batch jobs
- **Business Recovery Application Team Lead**, resulted in successful client app testing business continuity exercises

##### **Business Analyst / System Analyst / Integrator / Developer**

**1990 - 2000**

- System Analyst/Vendor Manager led the integration of a global Customer Relationship Management ( CRM ) system for Sales & Marketing; Designed UI with Sales/Marketing task force, planned the data conversion path from a legacy system and managed vendor consultants for the implemented; Integrated the CRM system for the organization enabling global cross selling opportunities increasing revenue by 18%
- BA/Dev implemented **Compliance** Lotus Notes system to track Personal Trading, Restricted Stock Watch List, Employee Outside Activities.
- Enhanced and supported PowerBuilder/Sybase/Lotus Notes app which tracked Venture Capital private and partnership deals, financial performance modeling; Lotus Notes Equity Research tracked commentary/compliance
- Business Analyst/Integrator, replaced paper equity trading process with vendor Equity Trading system utilized SWIFT format, improve work efficiency with increased trading volume by 37%; upgraded to a multi-currency platform

**Chase Manhattan Bank**, Programmer Analyst, New York, NY 1989 – 1990; **Leading National Advertisers**, Programmer Analyst, New York, NY 1985 – 1989

**Education:** PMP (PMI/Project Management Institute); IIBA; Masters in Computer Science, Queens College, 1990; BS in Computer Science, SUNY at Albany, 1984