



20+ years of Experience in Finance and Technology

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Where Technology Projects Meet Business Results

Transforming Systems, Processes, and Services Through Digital, Data, and AI Implementation

In an era where artificial intelligence separates market leaders from followers, AlfaFinTec delivers the strategic digital and AI transformation that organisations need to thrive, architecting intelligent business solutions that drive measurable ROI while maintaining the security and compliance standards that stakeholders demand.

Why Choose AlfaFinTec:

- **Proven AI ROI:** Delivered \$1.2M+ annual savings through strategic project transformation and digitalisation
- **Business-First Approach:** Projects aligned with strategic objectives, not just delivery milestones
- **Risk-Aware Innovation:** Balance innovation with regulatory compliance and operational stability
- **Portfolio-Level Thinking:** Transform entire business portfolios, not just individual processes
- **25+ years bridging business strategy, operational excellence, and emerging technology**

Identify opportunities where they create maximum business impact, not where technology is trendy



Proven Track Record

Delivering Business Results That Matter

✓ Project Portfolio Leadership Excellence:

\$40M+ global transformation portfolios with 25% delivery improvement | Enterprise PMO establishment increasing success rates by 30-40% | C-suite to operations bridge across major financial institutions

✓ Operational Transformation:

\$2.5M annual savings through process re-engineering (2010-2018) | Zero-disruption system migrations across multiple institutions | 15% cost reduction through agile transformation

✓ Executive Advisory:

Trusted C-suite adviser on technology investments | Multi-stakeholder management from board to operations | Complex business challenges translated into actionable solutions

✓ Innovation Leadership:

AI solutions delivering \$100K+ monthly value (2023-2024) | Competitive advantages through smart technology adoption | 33% reduction in operational disruptions through risk frameworks



Business Case Development and Executive Advisory

Executive Strategy Translation

Business Transformation

Stakeholder Management

Strategic Business Impact

Executive Strategy Translation

- Bridge C-suite vision with operational delivery capability
- Develop strategic roadmaps that balance ambition with practical execution
- Create business cases that secure stakeholder buy-in and funding.

Innovation Strategy & Implementation

- Evaluate emerging technologies for strategic business advantage
- Design implementation approaches that minimise operational risk
- Create sustainable competitive positioning through technology adoption

Business Transformation Framework

- *Design governance models that align projects with strategic objectives*
- *Implement portfolio management that optimises resource allocation*
- *Establish metrics that demonstrate tangible business value*

Stakeholder Ecosystem Management

- Navigate complex organisational dynamics from board to operations
- Build consensus across competing business priorities
- Manage change resistance through strategic communication.



Portfolio and Programme Management Excellence

Enterprise Leadership

Delivery Excellence

Business Transformation

Proven Results

\$40M+ Global Portfolio Leadership

Multi-regional transformation initiatives delivering 25-40% improvement in success rates whilst maintaining stakeholder satisfaction across major financial institutions.

Enterprise PMO Development

Established centralised operations framework transforming delivery culture, improving timeline accuracy by 30% and budget adherence by 20%.

Complex Migration Leadership

Managed seamless financial system transitions achieving \$2.5M annual savings with zero service disruption and full regulatory compliance.

Agile Transformation

Led enterprise-wide methodology adoption reducing delivery times by one-third whilst improving team productivity and engagement.

Innovation Project Direction

Guided cutting-edge technology initiatives including AI implementations generating \$100K+ monthly operational value.

Risk & Compliance Management

Implemented governance ensuring regulatory requirements whilst optimising for business value and operational efficiency.



Business Intelligence and Performance Optimisation

Executive Decision Support

Process Excellence

Value Realisation

Business Solutions

C-Suite Decision Framework

Analysis systems improving executive decision accuracy by 30%, providing real-time insights for complex business challenges and competitive positioning.

Resource Optimisation

Intelligence systems optimising allocation across initiatives, consistently achieving 20-40% improvements in capital deployment effectiveness.

Process Re-engineering

Comprehensive transformation initiatives converting traditional workflows into efficient, automated systems whilst maintaining quality standards.

Enterprise Risk Management

Frameworks proactively identifying and mitigating business threats whilst enabling innovation and competitive advantage.

Performance Analytics

Executive reporting systems providing actionable insights for portfolio management, resource allocation, and competitive positioning.

Value Creation Governance

Metrics ensuring all initiatives deliver measurable business value whilst aligning with organisational objectives .



Technology Integration and Innovation Leadership

Strategic Technology

Digital Transformation

Innovation Management

Technology-Enabled Solutions

Emerging Technology Assessment

Evaluate new technologies for business impact potential, ensuring investments align with objectives and deliver competitive advantages.

Digital Transformation Direction

Comprehensive technology adoption programmes modernising operations whilst maintaining stability and regulatory compliance.

AI & Automation Strategy

Intelligent automation solutions enhancing performance, reducing costs, and creating sustainable competitive positioning.

System Integration Excellence

Complex technology integrations enhancing capability whilst minimising disruption and ensuring seamless stakeholder experience.

Innovation Framework

Governance models balancing innovation velocity with risk management, enabling safe and effective technology adoption.

Business-Technology Alignment

Bridge strategy and capability gaps, ensuring technology initiatives support business objectives and deliver tangible ROI.



Operational Excellence and Change Leadership

Operational Transformation

Change Management

Performance Optimisation

Sustainable Transformation

Enterprise Change Leadership

Organisation-wide transformation embedding new operating models, ensuring sustainable adoption across all business functions.

Process Excellence

Re-engineer critical processes eliminating inefficiencies, reducing costs by 25-40%, and improving service quality whilst maintaining compliance.

Performance Management

Frameworks aligning individual, team, and organisational objectives with business strategy, driving consistent execution excellence.

Operational Risk Management

Systems protecting operations whilst enabling innovation through proactive threat identification and mitigation.

Stakeholder Engagement

Manage complex ecosystems across organisational levels, ensuring alignment between diverse interests and transformation objectives.

Cultural Transformation

Lead organisational culture change supporting business objectives, enhancing performance and sustainable competitive advantage .



Timeline

Proven Experience Across
25 Years

2018 – 2024: Fitch Ratings

- AI-powered solutions: \$100K+ monthly savings
- Global operations PMO: 25-40% delivery improvement
- Portfolio value dashboard: 30-40% efficiency gains

2010 – 2018: Northern Trust

- System migrations: \$2.5M savings
- Process re-engineering: Zero service disruption
- Regulatory programmes: Under budget delivery

2007 – 2009: FTSE Group

- Index operations transformation: 50% delivery improvement
- Risk management: 33% service interruption reduction

2003 – 2007: Standard & Poor's, Pioneer Investments, AXA IM, and JP Morgan


- Data and processes optimisation and improvement
- Improved tracking, reporting, and governance by developed custom tools

2000 – 2003: CITCO Group

- Enhanced operational productivity
- Process re-engineering and improvement

1996 – 1999: Business and Digital Transformation Consulting

- Operational and digital strategies implementations across multiple industries



Ready to Transform Your Business?

Phase 1: Strategic Discovery (2-4 weeks)

- Executive stakeholder interviews and current state assessment
- Opportunity identification and prioritisation analysis
- Quick-win identification for immediate value demonstration
- **Deliverable:** Transformation opportunity report with ROI projections

Phase 2: Business Case Development

- Detailed financial impact analysis and risk assessment
- Stakeholder alignment and investment justification
- Resource requirement planning and timeline development
- **Deliverable:** Executive-ready business case for board approval

Phase 3: Implementation Roadmap

- Phased delivery plan with clear milestones and dependencies
- Governance framework and success metrics definition
- Change management strategy and communication plan
- **Deliverable:** Practical execution roadmap with 90-day quick starts

Your Investment: Strategic insight with measurable outcomes from day one.



Appendix

Strategic Project Delivery Framework Examples

These illustrations demonstrate the strategic frameworks, governance models, and business transformation methodologies used across 25+ years of financial services project leadership.

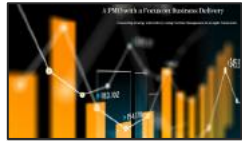
Coverage spans from foundational project governance and stakeholder management, to advanced portfolio optimisation and emerging technology integration.

All confidential and non-public information was removed from documents, frameworks, and strategic plans used in this section.



Strategic Business Advisory:

- Business Case Development & Strategic Positioning
- Executive Stakeholder Management & C-Suite Advisory
- Strategic Project Portfolio Optimisation & Governance
- Change Management & Organisational Transformation



A PMO with a Focus on Business Delivery
Created in 2021 to establish a new framework for the Ops PMO Department



Why Agile
Created in 2021 as justification and training material for converting to Agile



Agile Transformation: Sizing & Prioritisation
Created in 2022 to train Product Owners on Features management / prioritisation



Data Governance Framework Proposal
Created in 2023 to improve data accuracy and reliability



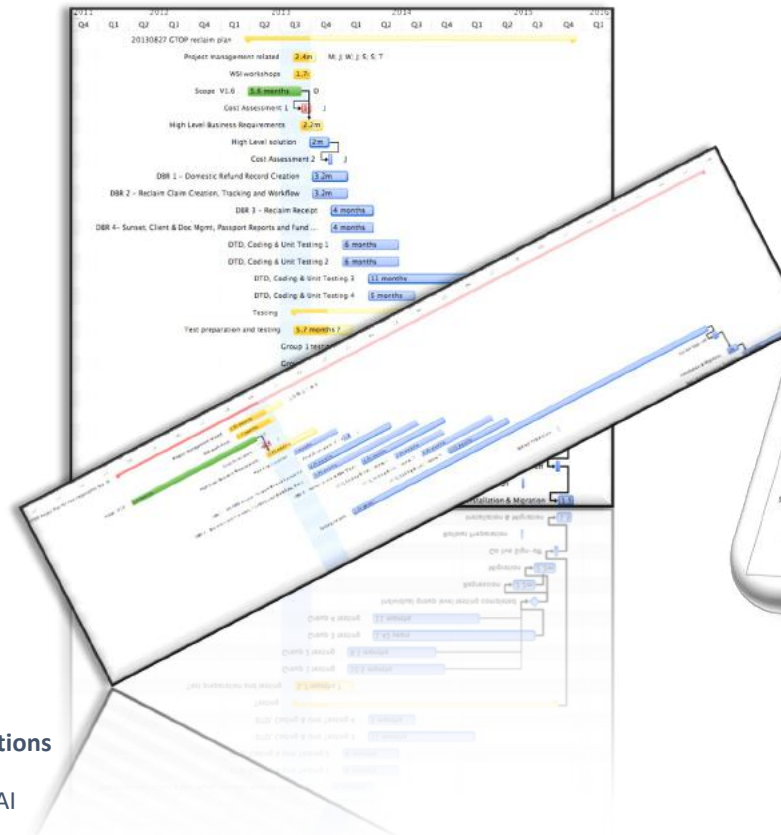
Leveraging AI in Business: Use Cases & Considerations
Created in 2024 to propose an AI Framework and different project features that rely on Generative AI

Proposals and Business Cases Consultations



Portfolio & Program Excellence:

- Multi-Million Dollar Portfolio Leadership & Delivery
- Enterprise PMO Establishment & Optimisation
- Cross-Functional Team Leadership & Coordination



Project, Program and Portfolio Management



Business Performance:

- Strategic Analysis & Executive Decision Support
- Operational Excellence & Process Optimisation
- Performance Management & Value Realization

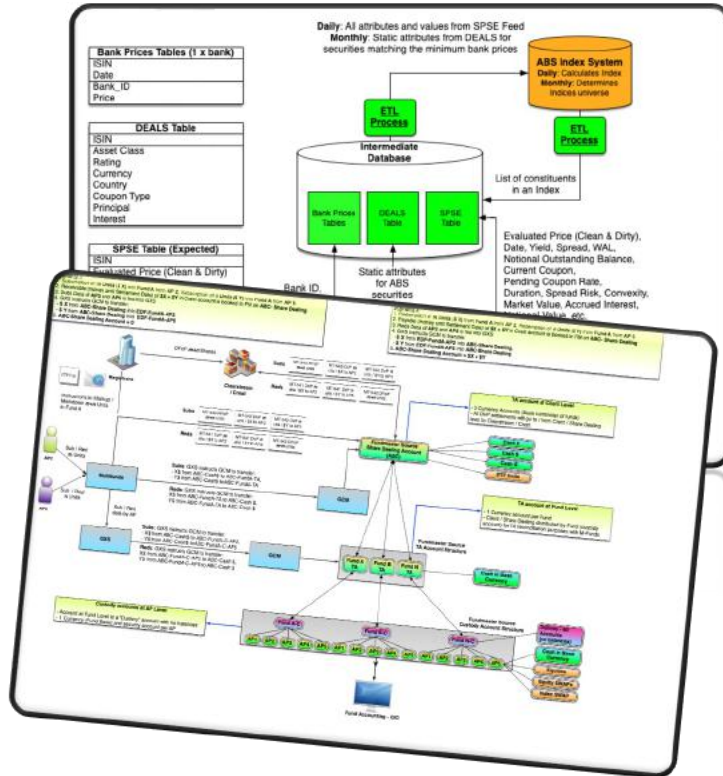


Project, Program and Portfolio Data and Reporting



Technology-Enabled Business Solutions:

- Strategic Technology Assessment: Emerging technology evaluation for competitive advantage
- Digital Transformation: Enterprise-wide modernisation with business focus
- Innovation Leadership: AI and automation strategy for operational excellence

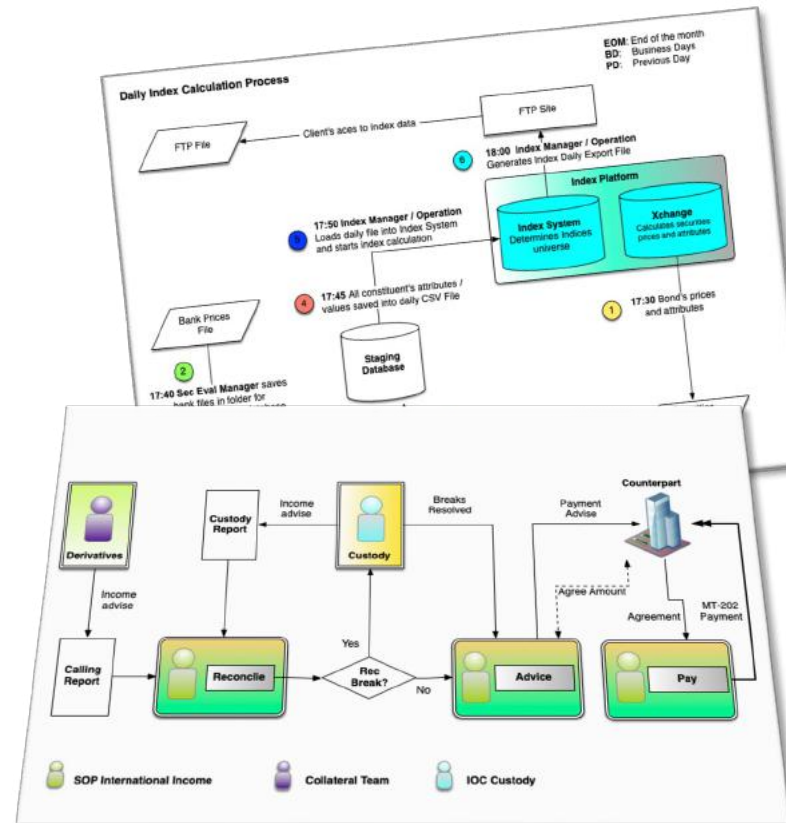


System/Data Workflows



Business Integration:

- System Integration Excellence: Complex technology adoption with minimal disruption
- Business-Technology Alignment: Bridge strategy with technical capability
- Change Leadership: Sustainable transformation across organisational levels

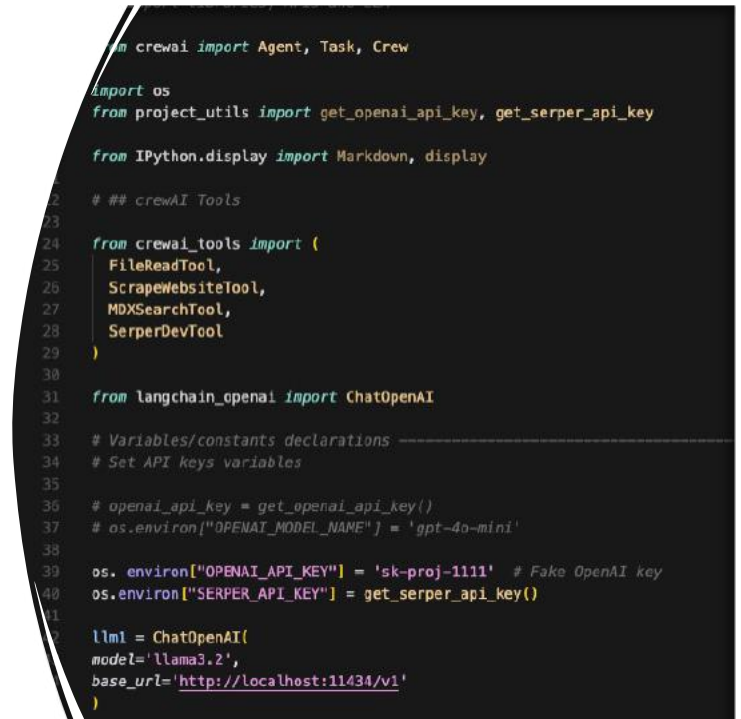


TOM / Automation Design



Competitive Positioning:

- Innovation Framework: Balance innovation velocity with operational stability
- Strategic Implementation: Technology adoption that creates market advantages
- Performance Optimisation: Continuous improvement through strategic technology



Data Analysis and AI Development



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