Mitchell Perry

**Scrum Fundamentals Certified**

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Work Summary

* Contributor in strategic initiative development and aligned project selection work sessions.
* Proficient in project management practices and structured methodologies, along with common corporate business functions and infrastructure requirements.
* GSE (Fannie, Freddie) compliance initiatives and reporting; privately held servicing and reporting
* Comprehension of organizational change curves, maturity models, and managing resistance to change.
* Mobilizer and team leader for enterprise sourcing, process improvement and implementation projects in compliance with triple constraints of cost, schedule and scope/quality.
* Developer of internal and external performance management dashboards enabling business intelligence reporting including benchmarking, metric identification, performance measurement, and target setting.
* Demonstrated ability to forge meaningful relationships with executives, stakeholders, supply chain, and outside vendors.
* Advanced written and oral communication, organizational, and analytical skills.

Summary of SKILLS

**Certifications**

* Scrum Fundamentals Certified
* Six Sigma Green Belt (DMAIC/DAIC)

**Methodologies**

* Risk management and Strategy Planning
* Project and Process Gap Analysis
* Agile and Waterfall Methodology
* SDLC lifecycle
* SLQ2CQ Process Improvement

**Professional Skills**

* Process Improvement/Change Management
* Requirements Gathering and Documentation
* Government Program Compliance and Compliance Auditing
* Quality Assurance execution and test plan review
* Proficient in data extracts, reports creation, maintenance, and automation
* Mortgage Default Servicing, Loss Mitigation, Foreclosure, Bankruptcy, and Reporting
* Fannie Mae and Freddie Mac Servicing Guidelines and Compliance SME
* Regulatory compliance with CFPB
* HIPAA compliance
* Sarbanes-Oxley (SOX) IT compliance
* IIBA’s BABOK framework
* SCRUMstudy’s SBOK framework
* Loansphere implementation/enhancement
* Executive level presentations

**Tools and Technology**

* Business Objects
* Project tools such as Clarity, Nexus, MS Project
* Agile tools, i.e. Version One, MS Team Foundation Server, JIRA
* QA tools such as HP Quality Management
* Proficient in BKFS functionality (Passports, trans etc.)
* Sharepoint, PCM, PPRT
* ERP enhancement and support
* Database query tools (SMS and Toad, SQL)

WORK Experience

Infosys 12/18-2/20

Business Analyst

* Capture and document requirements via user stories for changes related to end user reports generating from enterprise data warehouse
* Facilitating requirements gathering with lines of business to ensure thorough and accurate requirements
* Facilitating daily stand ups with development to ensure adherence to business expectations and delivery timeframe
* Facilitate meetings to prioritize backlog and sprint retrospectives
* Execute queries to validate data sourcing
* Facilitate QA and UAT to ensure report accuracy and remediate defects as soon as possible
* Capture all stories and acceptance criteria in JIRA
* Validate with LOB post-deployment to production

UX Tester

* Test functionality and likeability of production website, assuming the role of a prospective buyer of said products
* Document glitches, obstacles, and ease/difficulty of use in various scenarios related to entering customer information, adding products to cart, and completing the credit check and buying processes
* Perform scenarios in various browsers on both laptop and mobile devices

Business Analyst

* Gather and document business requirements related to retail supply chain and order fulfillment application
* Facilitating requirements gathering with lines of business to ensure thorough and accurate requirements
* Facilitating daily stand ups with development to ensure adherence to business expectations and delivery timeframe
* Facilitate meetings to prioritize backlog and sprint retrospectives
* Facilitate QA and UAT to ensure report accuracy and remediate defects as soon as possible
* Capture all stories and acceptance criteria in JIRA
* Update Confluence as knowledge repository for project and steady state documentation

Capital One

Process Consultant 1/19-5/19

* Document current process, capture critical to quality metrics and control points for Information Security Organization
* Show “as-is” and future state for various processes related to Capital One’s Information Security requirements, make reco
* mmendations to customers of the Risk Management outputs
* Align ISO and Risk Management processes to SLQ2CQ methodology
* Document future state, prepare L2 swim lanes, FMEA, Control Plan, CIP, etc.
* Perform gap analysis and recommend technical enhancements to streamline processes and secure gains
* Present findings, progress, and status routinely to executive level management

Wells Fargo

Implementation Manager, Business System Consultant 11/17 – 09/18

* Liaison between Organizational Risk group and technology team
* Creation and management of SDLC timeline for each release cycle; set delivery expectations of enhancements for risk assessment tool
* Facilitate meetings between key stakeholders and development teams to ensure overall release quality during coding and testing
* Facilitating daily stand ups with development to ensure adherence to business expectations and delivery timeframe
* Facilitate meetings to prioritize backlog and sprint retrospectives
* Facilitate QA and UAT to ensure report accuracy and remediate defects as soon as possible
* Facilitate defect remediation post-implementation
* Coordinate and perform UAT when needed
* Management of team tools via Sharepoint to communicate resource availability, release cycle deadlines, and other pertinent information to other tech and business groups
* Managing migration process from legacy risk assessment application to future application; ensuring complete documentation to pass audit requirements and communicate timelines to business to ensure smooth transition between applications.

Home Point Financial

Senior Business Analyst 3/17 – 8/17

* Document business and technical requirements related to data conversion project between legacy servicing platform and BKFS/MSP
* Creation of MSP templates to ensure system of record accuracy on Day One of conversion
* Capture and follow up on takeaways from mapping sessions from legacy platform to BKFS
* Document template mapping between Loansphere and MSP
* Document reporting requirements for Bankruptcy and Foreclosure lines of business related to Loansphere implementation
* Capture and follow up on takeaways from Loansphere mapping sessions
* Ensure external vendors prepared to migrate from legacy interface to Loansphere, as well as become data exchange partners with BKFS
* Create future state default process flows highlighting efficiency gains via automation and points where control reports would be needed for external compliance
* Capture requirements for scripts written in Java to facilitate process automation
* Capture requirements for secure APIs with external applications

Pacific Union Financial

Senior Business Analyst 9/16 – 3/17

* Function within project team, responsible for coordination of various lines of business to implement Compliance Management System (CMS) in order to meet CFPB standards
* Document current and future state process flows in order to coordinate vendors during system implementation to ensure compliance with CFPB regulations at all stages of borrower engagement throughout retention or liquidation processes.
* Implementation of web-based application designed to streamline default loan pipeline, from intake to resolution.
* Implementation of external portal for borrowers to initiate requests for assistance and upload documents securely via web
* Revamp intake, storage, and indexing of documents received by borrowers via both mail and portal
* Gather requirements, track deliverables, set expectations for executive sponsors and stakeholders accordingly
* Document changes made to BKFS/MSP in order to align with CMS program and default management tool implementation
* Facilitate UAT for internal default application and borrower portal
* Document current state process and KPIs, perform gap analysis, track action plans to address gaps as they are sent to and approved by Legal & Compliance
* Capture future state process, document KPIs/metrics, and changes needed to controls and related reporting
* Coordinate business requirements between lines of business and external vendor to ensure delivery and functional expectations are met or exceeded.
* Ensure all post implementation functionality and reporting compliant with industry, state and federal regulations
* Use SQL to query database
* Understand and capture requirements for Java-based functionality within customer-facing portal
* Capture security requirements related to third-party vendor and data stewardship
* Document reporting requirements related to ETL project (Loansphere and MSP)
* Participate in all scrum/grooming sessions related to various project activities

Cottonwood Financial

Business Analyst 2/16 – 5/16

* Function as part of project team, managing multiple project initiatives and clients to ensure timely and quality delivery of IT solutions.
* Creation and implementation of loan origination system and overhaul of external customer-facing website.
* Scrum sessions with various lines of business and SMEs to communicate development progress
* Create and obtain approval for user stories and acceptance criteria to be undertaken by development resources
* Migration of data from legacy to future systems
* Facilitate all scrum/grooming sessions related to captured user stories
* Escalating potential risks where necessary
* Coordinate with QA through testing phase
* Support of production environment post-implementation
* Support of accounting system, including A/P, A/R, and GL.
* Support of payment/disbursement system, including cash, ACH, and checks.

Bank of America

Business Analyst/Project Manager 03/15 – 11/15

* Managing timeline and setting delivery expectations for Application Access Automation project.
* Organizing meetings between respective technical teams for bank applications and Integrated Access Management org.
* Tracking milestone completion to determine adherence to schedule
* Facilitate scrum sessions related to IAM automation project
* Create change request to address scope changes and resource needs
* Manage budget constraints and submit request for additional funding based on changes in project goals or needs
* Lead deep dive analysis work sessions to identify gaps and risk.
* Engaged SME’s, process owners, and IT resources to ensure ongoing quality SDLC process
* Lead additional Small Work Effort Projects including Chronology Request Process in LPS
* Compile updates to present to stakeholders and risk, legal and compliance partners and senior management
* Create New Initiative Request and present to high level governance panels
* Create and present Tollgate Material for approval from PMO
* Work with LOB and Associate Readiness to create process design and procedures and associate job aids and all communications
* Update SharePoint and Discovery system of record
* Update PPRT (project record keeping portal) and 4 blockers weekly
* Create various PowerPoint decks for executive review
* Maintain WBS in MS Project and PPRT
* Maintained Nexus

Nationstar Mortgage

PMO Business Analyst 10/14 – 03/15

* Capture and creation of business requirements and process enhancements for Reverse Mortgage line of business
* Ensure complete and thorough communication of business needs to IT and testing resources undertaking development efforts and setting clear and concise delivery expectations and timeframes to stakeholders
* Document current and future state of claims process, perform gap analysis, reporting requirements and controls
* Engagement of SME’s, process owners, and IT resources to ensure ongoing quality SDLC process
* Serve as liaison between business and IT/testing resources during development lifecycle
* Ensure adherence to government and investor guidelines
* Use of SQL for data analysis and ad hoc business requests.
* Capture and communicate web application functionality using Java

Capital One

MSP Product Owner/Business Analyst 1/14 – 10/14

* Contribute to current and future state documentation around product functionality as MSP/BKFS subject matter expert.
* Daily scrum and sprint sessions with development and lines of business to ensure timely delivery and expectations
* Constant management of iterative sprint cycles focused on MSP functionality in order to optimize business productivity.
	+ Payment system and cash application logic (Lockbox, IVR, wires, ACH, web, and mobile)
	+ Lien release cycle from payoff to recording with local municipalities
	+ Credit bureau reporting
	+ Borrower correspondence and statements verbiage/response.
* Communicate and document changes made to enhance functionality for borrowers seeking assistance with home loans.
* Liaison between business units and IT during BKFS enhancement with government compliance initiatives.
* Document changes in reports as a result of technical enhancements to align with CFPB regulations
* In depth understanding of business processes to leverage BKFS/LPS in an optimal capacity.
* Facilitate UAT for agile release cycles
* Evaluate industry trends and partner with customers to develop short and long-term strategic roadmap
* Participation as Product Owner in agile environment.
* Compliance to RESPA, CFPB, and FHA requirements

Bank of America

Business Analyst, Business Technology Requirements Center of Excellence 7/13 to 9/13

* Ensuring compliance with Consumer Financial Protection Bureau regulation across several project implementation efforts
* Working alongside the line of business to ensure business requirements and subsequent documentation meets internal standards of excellence in quality
* Facilitate JAD sessions on project initiatives to ensure requirements are fully and accurately communicated to technology partners
* Facilitate communications with technology and testing resources to ensure ongoing implementation efforts and documentation meet internal standards of excellence in quality.
* Creation of project documentation, as well as review of previously created artifacts when stepping into a project midstream, to ensure previous and ongoing project artifacts meet standards of excellence.
* Execution of SQL queries using SELECT statements to gather data as needed.

Colonial Savings

Process Design Facilitator, Project Manager 4/13 - 6/13

* As part of a larger mortgage servicing transformation, facilitating and documenting process improvements and impacts between lines of business and 3rd party vendors.
* Documenting changes to various servicing processes with servicing platform conversion.
* Documenting data conversion and data dictionary for conversion from legacy servicing platform to MSP
* Ensuring changes in processes maintain compliance with respective regulatory parameters, i.e. SOX.
* Coordination with subsequent projects tied to mortgage servicing transformation to facilitate implementation
* Creation of change management process for organization
* Coordination with internal resources to create PMO.
* Automation/streamlining of several manual processes (Payment receipts and logic, borrower correspondence, investor reporting)
* Creation of repository for documentation of current and ongoing project work product.

Bank of America

Senior Business Systems Analyst, Home Lending and CSCC 04/12 to 01/13

* Analysis, support, and documentation in the Home Lending space related to process or technology engineering and enhancements, as well as regulatory and business compliance with internal and external security protocol. Responsible for producing design documents for use by application development teams, and quality assurance during testing phases to ensure defects were mediated in timely fashion, ie HLD/LLD’s, traceability matrices, test plans, etc.
* Work as project manager on minor releases, providing estimates on budget, timeline, and resources. Maintaining compliance w/ respective program or regulatory mandates, i.e. SOX, Treasury, OCC, when driving project changes.
* Use of six sigma and DAIC process to analyze and evaluate present state and proposed changes or enhancements to enterprise-wide systems related to loan servicing to ensure compliance from a regulatory and business perspective.
* Ensure project requirements are complete and fulfilled by technical requirements, manage downstream impacts to other systems.
* Project status and reporting documentation for stakeholders via Sharepoint project site maintenance.
* Hosting/facilitating JAD sessions to ensure adherence to IT best practices
* Responsible for creating and maintaining training documents for ongoing support teams and business users.
* Change management duties as assigned, i.e., RACI, UCRA, and WBS.
* Process gap analysis of current and future state for improvement initiatives within Home Lending’s default and conventional conforming portfolios.

AmerisourceBergen

Financial Implementation Change Manager 05/11 to 4/12

* Provide analysis, support and documentation for infrastructure upgrade of enterprise-wide ERP, including break-fixes, upgrades, enhancements, customizations, and testing.
* Followed ECMS methodologies to manage resources, timeline, and budget related to changes in scope due to external and business related pressures. Obtain stakeholder buy-in and signoff.
* Daily scrum sessions to ensure development progress and timely disposition of backlog
* Optimization and maintenance of cash inflow/outflow, A/P, A/R, and GL modules
* Critical to demonstrate understanding and explain potential financial impact related to implemented changes.
* Leading process improvement and system integration projects within strict time and budget constraints. Ensured ongoing HIPAA compliance post-implementation.
* Created reports, assured and validated report content, as well as data mapping and analysis.
* Ensured proper report automation and access to appropriate audience.
* Ensured regulatory, industry, and business compliance of all changes implemented to HIPAA standards.
* Tools included SQL, SMS, Toad, and Crystal Reports to create reports

Retreat Capital Management

Project Change Consultant, Government Program Compliance (Bank of America) 4/11 to 7/11

* Leveraged existing artifacts to determine system and process compliance for MHA-HAMP change management compliance projects related to Treasury’s Supplemental Directives.
* Audited internal quality assurance control processes, documentation, and findings adequately captured scope of Bank’s compliance with HAMP program.
* Performed gap analysis and recommended solutions where appropriate.
* When needed, documented timeline, budget, and scope of proposed changes.
* Worked with mortgage teams to optimize and streamline their end-to-end default servicing and management processes and applications.
* Identified opportunities to reduce defects and enhance compliance by evaluating process data and trends.

Saxon Mortgage

Business Analyst, HAMP/HAFA SME 07/10 - 4/11

* Analyzed downstream impacts to subsequent processes and created solutions to solve existing and potential pain points for HAMP workflow tool.
* Ensured regulatory, business, and technology compliance within organization.
* Created data maps for implementation of conversion to BKFS/MSP. Assessed impacts of changes to downstream applications.
* Conducted both business requirements gathering and application development sessions for all assigned projects
* Captured reporting requirements for HAMP workflow and data conversion projects
* Reviewed test scripts with Quality Analysts as well as User Acceptance Testing groups, and validated results during QA, UAT, and post production phases of deployment.
* Tools included SQL and SMS
* Ensure data consistency and availability during transition between servicing platforms.

JPM Chase

Home Ownership Advisor 11/09 – 07/10

* Held face to face consultations with imminent default and seriously delinquent borrowers to discuss options focused on home ownership retention.
* Served as a liaison between the borrower, underwriting and technology team to expedite the loan modification and short sale processes to ensure complete transparency and eliminate delays.
* Ensured 100% borrower and program compliance of each case seeking assistance.
* Ensured all communications with borrowers met with SOX constraints..
* Set proper forecasting expectations as to the loan modification process and timeline.
* Monitor trial plans to ensure program compliance.
* Conducted quality assurance audits on files submitted by peers to ensure adherence to standards.
* Workflow monitoring and tracking done via MSP templates
* Performed offsite outreach events to assist borrowers in loan modifications.

ATX Financial Group (Austin, TX)

Sr. Business Analyst 03/08-11/09

* Primary point of contact for HAMP/MHA implementation; maintained business rules and IT documentation introducing brand new processes to Default. Documentation included BRD’s, FRD’s, flowcharts, traceability matrices, etc.
* Risk management and strategy planning sessions focused on introduction of new government program into existing company business and technology infrastructure.
* Acted as project manager when needed. Created project charters, estimates of resources and budget around various solutions.
* Ensured compliance to government, industry, and company specific rules for all applications affected, i.e. SOX, Treasury, etc.
* Served as liaison between the technology build team and private bank business users.
* Assist the business in identifying, assessing, and documenting priorities, business cases, and audit points.
* Identify and communicate risks to producing various deliverables and solutions on time.
* Develop use cases to explain / demonstrate business requirements / specifications to IT team.
* Work with other analysts and the technology, build-development team to design solutions for client.
* Conducted impact analysis of proposed solution across private bank shared services technology.
* Maintained technology best practices around reporting to LOB users.
* Documented enhancements to MSP and reporting
* Tools included SQL and MS Access

Loss Mitigation Supervisor 05/07-03/08

* Supervise 10 - 15 loss mitigation specialists in gathering and processing documents for short sales, modifications and deeds-in-lieu. Monitored team performance for quality assurance, give feedback, and provide coaching to strengthen performance.
* Trained staff in applications, business rules and regulatory requirements related to default servicing to obtain 100% compliance.
* Verified income and customer provided information.
* Review borrower submissions to eliminate stipulations in a timely manner.
* Point of contact for borrower escalations
* All team and work activity performed within MSP as system of record
* Analysis and referral to various homeowner retention and liquidation solutions based on government, investor, and servicer parameters/guidelines
* Subject matter expert in projects revolving around process and technology improvements.