

## Professional Profile

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I am a highly versatile, impactful and driven executive with 22 years of experience in management consulting with 13 specialising in large and complex business transformation programmes in Financial Services. Having worked for KPMG, PwC, IBM and Accenture, I have considerable expertise in end-to-end implementations of operational models. I am a seasoned and self-driven business development professional, who is motivated to being meaningful for people, working and growing with high-performance teams. I am fluent in English, Portuguese (native) and Spanish

## Professional Competencies

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- Top performing leader able to deliver projects and programs within global companies with a strong track record in successful large-scale technology delivery and business transformation projects
- Leading business developer and published expert in Fintechs and Insurtechs
- Highly effective in business development, from prospectation through to completed signed off contract
- Hiring, developing and mentoring high quality staff and future leaders building up teams and individuals
- Proven relationship builder with key stakeholders acting as an ambassador and a facilitator
- Driven to succeed and 'get things done' including hands on problem solving when required

## Professional Skillset

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Business transformation	Solution Architecture	Client Management
Productivity	Business Agility	Solution Design
Mergers/business integration	Programme Management	Change Management
Stakeholder Management	Project Portfolio Management	Business Development

## Employment History

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### **Deloitte UK**

### **Senior Manager/Consulting in Organisational Design in FS**

**2019 - Present**

Overall leadership and oversight in managing and delivering complex Organisation Design, Change & Communication and Operation programs. Have led on practice elements focused on Fintechs and Insurtechs, managing relationships, participating in demo days, hosting overseas delegations, networking opportunities and conferences, including the development of a Fintech chapter for an internal global report called "Bank of 2030". As practice development, bold support of learning sessions, key recruitment activities and staff mentoring:

- Developing a stakeholder analysis/communication plan for a large financial institution during a significant finance transformation program
- Led an internal project, to design/implement a portfolio management office for all internal initiatives which was over 200 projects / £250mm
- Development of a paper about challenges and alternatives for enterprise wide transformations in universal banks highlighting main challenges and propositions

### **KPMG Brazil**

### **Partner Director/Consulting in FS**

**2015 - 2018**

Identification, development, qualification and management of the business opportunity portfolio, including the expansion of current opportunities. Definition of value propositions, risk evaluations, pricing proposals, negotiations, and onboarding of engagements. Led project deliverables in Insurance Companies in Latin America market initiatives. Produced a business pipeline of £5mm, from 2015 to 2018, with a 45% conversion rate:

- Developed relationships with Insurtechs and Fintechs by mentoring them, attending conferences and becoming a formal member of the innovation committee at Brazilian Insurance Regulator
- Led the design and implementation of a new business unit, Group Life, including a platform implementation overseeing a team of 12 and a budget of £2 mm
- Led a business transformation program for Call Centre productivity in an Auto Insurance Market Leader with a budget of £1mm, with 76% FTE reduction and 40% issuance contact rate improvement

- Collaborated on Due Diligence on behalf of a leading bank in Brazil, to assess the acquiring of a new business leading the operations and technology team, assessing the potential gain, risks and opportunities

**PwC Brazil**

**Director/Consulting, Finance in FS**

**2013 - 2014**

Led the development and maintenance of an efficient and effective work structure (scope/ resources/ deadlines/ results) in FSI projects. Identified and qualified new businesses and/or current expansions, value proposition definition, risk evaluation, development and pricing of proposals, negotiation and onboarding. Received PwC's "Impact Awards" for "creating and maintaining relationships" and "acting with passion for services provided for the client". Produced a business pipeline of £1.5MM 13/14 FY, with a 55% conversion rate:

- 100% of the objectives met for onboarding, evolution and management of the Integration program and formal recognition by the regulator for the integration of two insurance companies in the Brazilian market
- Assessment and advice to an automaker Bank planning and application for an operation licensing, ranging from market analysis, product portfolio, P&L projections etc.

**Accenture Brazil**

**Senior Manager/Advanced Group in Management Consulting 2012 - 2013**

Led projects across local and global locations, managing a pipeline with 20 opportunities and over 79 thousand hours. Buenos Aires operation started-up as planned:

- Visiting the Asia operations (Mumbai and New Delhi), to absorb the model, assets and competencies to replicate in Latin America
- Planning and management of FSI advanced consulting group through metrics/reports and weekly conference calls with the local and global leadership

**Accenture Brazil**

**Senior Manager/Management Consulting: FS**

**2010 - 2012**

Led significant and large projects across Latin America:

- Program leadership of a massive SAP implementation in one of the top 2 Brazilian banks
  - Completed an IT selection project for the Brazilian stock exchange from business case to implementation, with a turnaround of a severe delay scenario
  - Integrated architecture design, development and implementation of an accounting, management, fiscal and risk information framework, in top 5 Brazilian banks
  - Program managed the integration of two leading insurance companies leading the technology and back office teams alongside my consultancy team on a project recognised at CEO level

**IBM (Global Business Services) Brazil**

**Senior Manager/FS Consulting**

**2003 - 2010**

Delivering high profile Latin American projects for IBM including:

- Assessment, business design and technical architecture for the whole finance function in a leading insurance company, including IT package selection. Led a team of 8
- Led a team of 23 consultants in the transformation of the back-office model for credit and treasury operations (structure, processes, customer service, SLA's and indicators) of the second largest Brazilian private bank
- Led a team of 12 consultants on the conception and implementation of an integrated model for corporate performance in the 2nd largest Brazilian private bank
- Assessment of an ongoing system architecture project, with bold improvement recommendations, including compliance to leading practices, in a large private Brazilian bank. I was part of the business and strategy team, composed by US professionals and myself. It was a confidential project, with direct report to the board
- Implementation of a credit risk analysis tool, according to the requirements of Basel II, for a large private bank (Fermat)

## **Education and further training**

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| • Strategy & Innovation (in progress)                      | MIT 2022         |
| • ICAgile Certified Professional                           | 2019             |
| • Developing executive competencies                        | KPMG 2017        |
| • Advanced Relationship and Negotiation skills development | PwC 2014         |
| • Leadership program                                       | Krauthammer 2013 |
| • Financial Institutions Management, Banking:              | FGV-SP 2007      |
| • Master's in Management                                   | PUC 2001- 2004   |
| • Financial Management                                     | FGV-RJ 1997      |
| • BA in Mechanical Engineering                             | UFRJ 1994        |