

JOHN SHEPHERD

POSITION: Senior Consultant

SPECIALTIES: Management consulting for pre / post conversion impact / process optimization, business process improvement, change management. Experience and expertise in financial services, trust and securities operations and product management.

EXPERIENCE:

- Provided program / project management for over 40 system conversions.
- Product manager at two system providers for financial service accounting systems including the design and content of browser-based workstations.
- Conducted pre/post conversion impact studies, and process optimization reviews for over 30 institutions.
- Manager of the Quality Assurance Teams for the Wealth Management Segment responsibilities included designing and coordinating processes for system and solution code move, QA and release management.
- Provided thought leadership, industry knowledge and mentored offshore teams for the purpose of assuring their successful execution of duties and responsibilities.
- Product Manager – EMEA reported to the Director of Sales and was responsible for ensuring the accounting system met UK and European requirements.
- Provided consulting resources to a large number and variety of financial institutions.
- Managed on-site teams at engagements supporting conversions to various software platforms. Services included: pre/post conversion support, process re-engineering, automation design and implementation, training, testing and system balancing.
- Managed all aspects of trust / custody operations of various sizes and complexities.
- Conceived, developed and directed the implementation of a establishing a client service team to support the 45 branches.
- Managed operations in newly-acquired institutions with the responsibility for: stabilizing the operations, converting to the platform of choice and centralizing operations to the head office.
- Conceived and implanted a process re-engineering program that improved proficiency from 37% to over 99%.

POSITIONS: Founder & Member
Condado Consulting, LLC

Vice President & Product Manager
Innovest Systems

Vice President
Wilmington Trust Corp.

Vice President & Product Manager
SunGard Wealth Management Services

EDUCATION: Campbell University, BBA, Trust Education

Pragmatic Marketing Certified