

# Christian Lee Conrad

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## OBJECTIVE

To manage information technology efforts, including the design, development and maintenance of internet or intranet-based products and services in the financial services Industry.

## SUMMARY

A project / process manager with 10+ years experience leading and developing information technology solutions, I am proficient at all phases of the systems development life-cycle, from concept, analysis, design, to coding and testing. Other skills include information modeling, award-winning Web design, proposal development, issue resolution and overall client relations.

## PROFICIENCIES

Project Leadership	Process Management	SDLC
Information Architecture	Client Relations	Teambuilding / Mentoring
Prototype Design	Needs Assessment	Proposal Development

## TOOLS

<b>Expert Knowledge</b>	MS Access	MS Excel	MS Visio
	MS Project	Quality Center	Rapid SQL
	PlanView	JavaScript / VBScript	HTML / CSS
	ASP / ASP.NET	Mindjet MindManager	PICCT Change Mgmt Tool
	Beta TTS Backoffice	Toad / SQL Navigator	SharePoint
<b>Working Knowledge</b>	MS Visual Studio .Net	Oracle	DB2
	Web Sphere Studio	SQL	Java
	SQL Server	C#	JSP

## PROFESSIONAL HIGHLIGHTS

- Managed day to day operations and enhancements to the Wells Fargo Advisors Annual Account Fee process, which assesses fees for brokerage accounts across all six WFA sales channels and 100+ independent clearing firms.
- Helped design, produce and manage a multi-million dollar, customer relationship reporting application for Bank of America's Consumer Real Estate Division.
- Served as the University of Florida's first Web Administrator, during which I co-designed the University of Florida Home Page, ranked one of the top college web sites by MSN in Nov. 2000.
- Received several awards, including 6 customer service commendations while with Wachovia Securities / Wells Fargo Advisors, and two Golden Gator Director's Choice Awards, for my accomplishments in web development and customer relations at the University of Florida.

## PROFESSIONAL EXPERIENCE

### **Vice President, Process Manager, Program Manager, Project Manager**

*Wachovia Securities / Wells Fargo Advisors, Charlotte, NC* 2/05 – Current

*Account Fee Process* Project Manager, Process Manager, SME 1/05 – Current

Managing the process that charges over \$140 million in brokerage servicing fees in the U.S. and Latin America. Responsible for coordinating with business and technical representatives to define and implement enhancements, while managing production support tasks, issues and timelines. As the foremost subject matter expert, I have also helped hire and train new team members, analyze data anomalies, document business and technical requirements, and led training presentations with audiences of over 500 financial advisors. Enhancements that I have managed include:

- Expanded the charge population from 3 million accounts in 3 sales channels in 2005 to an expected 10 million in all 6 channels in 2011.
- Increased system flexibility to allow fees, fee waivers and price adjustments to be defined by sales channel, branch and product type.

- Created robust projection reports that accurately predict the accounts to be charged and revenue for the upcoming fee cycle over six months prior to charging the customer.
- Developed an authorization workflow that allows for final sign-off by the financial advisor prior to any fees being charged to their accounts.
- Added administrative interfaces that decreased turnaround time to adjust system parameters from weeks to hours.

**Tools Used:** MS SharePoint, Beta TTS Backoffice, PICCT Change Management Tool, AllFusion Harvest, HP Test Director / Quality Center, SQL, Oracle 9i, 10g, DB2, Rapid SQL, Toad for Oracle & DB2, MS Sharepoint, Access, Project, Visio & LiveMeeting.

*Firm Householding*

*Program Manager, Project Manager SME 11/07 – Current*

Managed projects to enhance and support the Firm Householding customer aggregation process, which is used to group all active WFA brokerage accounts. As manager and lead subject matter expert, I trained and supervised a team of up to 6 based in Chicago, Charlotte and St. Louis. Enhancements included:

- Streamlined 40 reports into 3 multi-level reports, meeting all business needs while reducing service calls from approximately 30/year to 2/year.
- Added a research report that allows the business to more easily explain how accounts were grouped and/or changed groupings.
- Added functionality where users could rename the household.

**Tools Used:** PlanView, Beta TTS Backoffice, PICCT Change Management, AllFusion Harvest, HP Test Director, MS Sharepoint, Access, Project, Visio & LiveMeeting.

*Wells Fargo Conversion*

*Program Manager, Project Manager 8/09 – Current*

Coordinating 6 merger-related projects involving twelve application teams over the course of one year, including the project to convert 10 applications to the new combined Wells Fargo General Ledger system. Supervising the addition of two new WFA sales channels into the account fee process, while serving as the primary subject matter expert in that area, and coordinating a team of 8 developers, analysts and PMs based in Chicago, Charlotte and St. Louis.

**Tools Used:** PlanView, Beta TTS Backoffice, PICCT Change Management, AllFusion Harvest, HP Test Director, MS Sharepoint, Access, Project, Visio & LiveMeeting.

*AG Edwards Conversion*

*Program Manager, Project Manager 11/07 – 6/08*

Managed the delivery of merger scope items for three systems leveraged heavily by financial advisors and other publics internal to the bank. Assembled and led a team of PMs, analysts and developers working from four cities. Worked with business and technical resources to define deliverables, which included a suite of revenue forecasting reports, legacy data conversion and augmenting the processes to handle twice the data and usage volume post merger. Efforts included oversight of 8 releases stretched over 12 months. **Tools Used:** Beta TTS Backoffice, PICCT Change Management, AllFusion Harvest, HP Test Director, MS Sharepoint, Access, Project, Visio & LiveMeeting.

**Web Application Developer, Designer**

*Wachovia Wealth Management, Charlotte, NC 1/04- 2/05*

*Insurance Policy Management System*

*Designer, Developer 5/04-2/05*

Redesigned a .NET insurance policy management application for use at several Wachovia Trust Centers in the Southeastern United States. Employees use the system to manage accounts and policies from opening through a series of internal compliance reviews. **Tools Used:** ASP.NET, C#, SQL, HTML, CSS, JavaScript, Oracle 9i, MS Visual Studio .NET.

*Web Portal*

*Designer, 1/04-5/04*

Designed the look and feel for the Wealth Management Unity Web portal interfaces and the application-level frameset. **Tools Used:** Adobe PhotoShop, Adobe Illustrator, MS Visio

### **Web Application Developer, Analyst, Coordinator**

*Bank of America, Charlotte, NC 8/02- 1/04*

*ATM Management Designer, Developer, Business Analyst 10/03-1/04*  
Produced a .NET workflow management application in Bank of America's ATM Services division. The system is used by a nationwide bank audience to coordinate ATM installations, upgrades and removals. **Tools Used:** ASP.NET, C#, SQL, HTML, CSS, JavaScript, SQL Server 2000, Dreamweaver MX, PhotoShop

*CREST System Designer, Developer, Communications & Training Coordinator, 8/02-10/03*  
Developed an intranet-based frontend for the Customer Relationship Enrichment System, an intranet-based, multi-million dollar relationship deepening reporting tool serving over 14,000 bank associates in 6 sales channels. Also coordinated related communications and training efforts to various bank audiences. **Tools Used:** SQL, ASP, HTML, CSS, JavaScript, SQL Server 2000, Dreamweaver MX, PhotoShop, Illustrator, MS PowerPoint

### **Web Application Developer, Site Designer**

*Libby Hill Seafood, Inc., Greensboro, NC 4/01-9/03*

*Order Entry System Designer, Developer, 3/03-9/03*  
Designed and developed a Web-based order entry system through which the company's franchise operators can input orders to the warehouse. **Tools Used:** Microsoft SQL Server 2000, ASP, HTML, CSS, JavaScript, Macromedia Dreamweaver MX

*Libby Hill Web Site Designer, Developer, 4/01-1/02*  
*www.libbyhill.com*  
Designed and produced an external Web presence for the company and its franchises. **Tools Used:** HTML, CSS, JavaScript, Adobe PhotoShop, Adobe ImageReady, Dreamweaver MX

### **Web Application Developer**

*First Union Capital Management Group, Charlotte, NC 9/01-8/02*

*Workflow Web Apps Designer, Developer, 9/01-8/02*  
Designed and produced Web interfaces for several internal imaging and workflow applications, which utilize IBM's MQ Series Workflow, WebSphere and JSP. **Tools Used:** IBM WebSphere, MQ Series Workflow, Enterprise Information Portal, JSP, Java, HTML, CSS, JavaScript, WebSphere Studio App. Developer, Macromedia Dreamweaver UltraDev, PhotoShop.

### **Web Administrator**

*University of Florida, Gainesville, FL 5/99-6/01*

*www.ufl.edu Administrator, Project Manager, Web Designer/Developer 5/1/99-2/1/00*  
Established and managed the UF Web Administration development team, which included as many as three full time and five part time designers, coders and content coordinators. Accomplishments under my tenure included:

- Created a Web-based, interactive FAQ knowledgebase to route e-mailed inquiries, which reduced the volume of misdirected e-mail 60% for the admissions department alone during the first month. The system won a Golden Gator award for the most outstanding computer / Web-based communications project by a panel of local public relations professionals.
- Redesigned and modernized the UF Virtual Tour, which was awarded a Four Star Award by CampusTours.com in March 2002.
- Created an RSS news channel for viewing administrative announcements, campus events and local weather on a PDA. It was the first university channel of its kind and the subject of several write-ups in the local media.
- Re-designed the UF Home page, using online surveys, focus groups, and one-on-one usability tests. The final design was ranked one of the top college web sites by MSN in November 2000.
- Developed and enforced Web policies and standards.
- Served on several university-wide committees, gave seminars and offered consulting in web standards, policy and design.

- Developed and managed content for 15 administrative Web sites, including the UF home page.
- Founded the UF Web Administration, which included creating unit Web management roles across campus, a university Web policy group and Web presence committee.

**Tools Used:** HTML, CSS, JavaScript, Java Applet, SSI, Apple QuickTime VR, Adobe PhotoShop, Adobe ImageReady, Macromedia Dreamweaver, Macromedia Flash, Perl, RightNow Web, RSS, Palm Emulator, Microsoft FrontPage, Adobe GoLive

**Webmaster**

*UF College of Journalism and Communications, Gainesville, FL 9/97-9/98*

**Freelance Web Development\***

<i>Plaza Midwood Neighborhood Association, Charlotte, NC</i>	<i>7/05 - 12/05</i>
<i>PGA Tour Chrysler Classic of Greensboro, Greensboro, NC</i>	<i>2/05 - 9/06</i>
<i>Clemson University Outdoor Lab, Clemson, SC</i>	<i>6/03 - 3/04</i>
<i>S L Collins Associates, Inc. Recruitment Firm, Charlotte, NC</i>	<i>9/02 - 8/03</i>
<i>USF Department of Neurosurgery, Tampa, FL</i>	<i>6/01 - 10/02</i>
<i>Maples Center for Forensic Medicine, Gainesville, FL</i>	<i>8/00 - 10/00</i>
<i>UF Office of the President, Gainesville, FL</i>	<i>8/97 - 5/99</i>
<i>Brechner Center for Freedom of Information, Gainesville, FL</i>	<i>1/97 - 9/97</i>

\*Please visit [www.clc-online.com](http://www.clc-online.com) for more information on my freelance projects.

**Editor/Writer/Ad Coordinator**

*National Fisheries Institute, Washington, DC 1/95-9/95*

**EDUCATION**

**Master of Arts in Mass Communication 3.76 GPA**

*Focus in Electronic Media  
University of Florida, Gainesville, FL 8/96- 5/99*

**Bachelor of Arts in History, Minor in English 3.1 GPA**

*East Carolina University, Greenville, NC 8/90-5/94*

**HONORS & AWARDS**

- Promoted to the title of Vice President at Wells Fargo Advisors 2010
- Served as president of the Plaza Midwood Neighborhood Association 2006-07
- Received 6 awards for customer service while with Wachovia Securities 2005-10
- UF Golden Gator Award for Communications, New Media Category, for "Ask UF" 2001
- UF Golden Gator Director's Choice Award for Excellence in Communications 2000
- University of Florida Outstanding Student Presidential Recognition Award 1998
- East Carolina University Academic Order of Omega 1993
- National Art Honor Society 1990