

# Kate Sanchez

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123 First Street, Stamford, CT 06901  
(203) 555-9999  
ksanchez@email.com

## Operations and Management Executive

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### **Knowledge Management / Workforce Productivity / Program Management / Business Process Re-engineering / Leadership & Employee Development / Cross-Functional Teams**

Experienced leader of innovative programs—in a variety of industries—to reduce costs, improve efficiency, ensure client loyalty, and achieve business goals.

Managed global, multi-year, multi-million dollar initiatives for Merrill Lynch. Strengths in strategic planning, system design, and resource / vendor relationship management contribute to "best of breed" program management capabilities.

Broad-based technical knowledge—information architecture, intranets, databases, software applications, and hardware platforms.

## Relevant Experience

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**Merill Lynch**, New York, NY 1991-Present

**Employee Portal Program Manager and Chief Operating Officer**—IT Lab (2000-Present)

**Year 2000 Global Program Manager**—Financial Group (1996-2000)

**Lead Architect & Senior Project Manager**—Financial Group (1999-2000)

**General Ledger Strategy Manager** (1995-1997)

**Financial Systems Operations Manager**—Financial Group (1991-1999)

Directed the development and operation of financial and e-workforce support systems for Merrill Lynch, a global financial services firm with annual revenues of approximately \$10 Billion and 18,000 employees.

As Chief Operating Officer for the Knowledge Management & Screening team, accountable for expense, people, vendor, facilities, and supply management. During tenure in the Financial Group, managed up to 150 staff located in four continents and a \$100 Million technology budget.

### **Accomplishments: E-Solutions Development**

- Created the strategy, architecture, and operating model for an employee intranet portal (Web-based desktop computing) to be used by all personnel worldwide.
- Spearheaded an employee self-service Web site for all corporate resource group activities (e.g., procurement, human resources, benefits, legal) that served the firm's recruiting and productivity agendas.
- Developed a Web-based employee directory comprised of 100,000+ personal Web pages. Project launched on-schedule despite losing two key personnel within five days of the deadline.
- Evangelized the benefits of knowledge management, content management, and portal architecture for the lines of business; and consulted on implementation plans.
- Transformed personal skill set from legacy technology support to developer of transformational intranet solutions for all Merrill Lynch entities.

### **Accomplishments: Program Management**

- Led a three-year Y2K program from start to finish: Oversaw cost effective replacement of the general ledger, renovation of over 100 applications, and upgrade of 1,500 desktops. In Jan. 2000, the firm was able to produce timely, accurate, and complete financial statements.
- Managed the full lifecycle of Euro-conversion program. Result: All financial and regulatory reporting correctly reflected conversion of impacted currencies to the Euro by deadline.

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**Merill Lynch (continued)****Accomplishments: Finance Operations**

- Conceived and executed a general ledger strategy that improved controls by reducing the number of software packages 70% by converting to PeopleSoft, consolidating the chart of accounts from 150 to two, and streamlining operations locations from 25 to two.
- Cut operating costs by facilitating an outsourcing arrangement while retaining employee knowledge capital.
- Reduced the size of the Financial systems application portfolio by 25%.
- Responded to changes in business drivers for the Financial group by rethinking business, information, application, and technical architecture. Innovated a new strategy, shared sourcing, which streamlined the data for all Financial systems.
- Improved data quality and minimized Merill Lynch's regulatory capital withholding requirements by leading a comprehensive review of required regulatory reporting.

**Accomplishments: Diversity and Recruiting**

- Initiated a well-received diversity program that contributed to employee retention.
- Developed recruiting strategies and a relationship with the University of Michigan that resulted in exceeding hiring targets.

**Additional Experience**

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Quality Assurance Analyst, AAA of Connecticut, Stamford, CT  
Account Manager, Ford Trucks, Dearborn, MI  
Accounts Receivable Manager, Acme Computer Systems, Detroit, MI  
Teaching positions at schools in Michigan and Argentina  
(details available upon request)

**Education**

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**Bachelor of Arts**, Cum Laude Honors  
University of Michigan

**Ongoing Professional Development:**

Graduate Courses in Accounting, New York University  
Six Sigma Productivity Methodology, Merill Lynch Continuing Education  
SEI CMM Training, Merill Lynch Continuing Education  
Bank & Financial Accounting, Merill Lynch Continuing Education  
Systems Architecture, Merill Lynch Continuing Education

# Sample ASCII Plain-Text Conversion

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Program Management / Business Process Re-engineering  
Leadership & Employee Development / Cross-Functional Teams

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RELEVANT EXPERIENCE

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MERRILL LYNCH, New York, NY  
1991 to Present

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facilities, and supply management. During tenure in the Financial Group, managed up to 150 staff located in four continents and a \$100 Million technology budget.

Accomplishments: E-SOLUTIONS DEVELOPMENT

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Accomplishments: FINANCE OPERATIONS

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ONGOING PROFESSIONAL DEVELOPMENT

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- \* Bank & Financial Accounting, Merrill Lynch Continuing Education
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