

# Michael Zupa

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## PROFESSIONAL EXPERIENCE

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**Citi Group**, New York, NY (January 2022 – June 2024)

*Senior Vice President - Finance Transformation*

- Led key activities that drove operational excellence and continuous improvement across the Finance organization on behalf of the Finance COO and Citi's Chief Financial Officer. These activities include designing and implementing operating model enhancements, developing objectives and key results, implementing comprehensive metrics to monitor the Finance organization's operating effectiveness and financial performance, and leading large-scale projects to design and implement business strategies, including process re-engineering and simplification efforts, regulatory remediation initiatives, adoption of new regulatory or business requirements, and technology implementations.
- Supported senior leadership, including the COO, in developing tools, methodologies, and strategic project plans to continue to build and grow the firm's Finance Transformation Special Projects
- Partnered with senior leadership to design and implement operating model enhancements, process re-engineering, and strategic initiatives aligning with organizational goals.
- Led high-impact transformation initiatives, aligning operational strategies with business goals and driving technology implementation.
- Spearheaded process re-engineering, reducing inefficiencies and achieving a 20% operational improvement.
- Collaborated with senior leadership to design and implement strategic frameworks for business transformation.
- Developed key performance metrics, reporting dashboards, and executive-level presentations to track program success.
- Managed cross-functional teams, ensuring alignment with corporate objectives and governance standards. Partnered with senior leaders to prioritize business strategies, assess investments, and foster a culture of continuous improvement.
- Developed and communicated strategic initiatives through comprehensive presentations and executive-level communications.

**Dixon Hughes Goodman**, New York, NY (July 2018 – January 2022)

*Program Manager - CFO & Business Advisory*

- Developed and executed cross-functional transformation initiatives, aligning business processes with strategic goals.
- Led enterprise-wide transformation initiatives, aligning technology and business functions to optimize performance.
- Designed and implemented target operating models, standardizing methodologies across global teams.
- Developed change management strategies and Lean/Six Sigma process improvements, increasing operational efficiency by 30%.
- Provided executive leadership with data-driven insights for strategic decision-making.
- Designed and implemented target operating models, optimizing reporting accuracy across 50+ countries.
- Designed scalable systems and redefined reporting structures to support business growth.
- Led the transition to a centralized SAP-based financial system, optimizing processes and enhancing transparency.

**AIG**, New York, NY (October 2014 – June 2018)

*Program Manager - Manager Enterprise Finance Transformation (EFT)*

- Advocated change management efforts to implement new processes. Spearheaded business process improvement efforts focused on underwriting, claims, and reporting, covering both front-end and back-end activities using Lean/Six-Sigma tools and techniques and defining new operating models.
- Served as a team leader in implementing the Future State Vision, Process Design, Target Operating Model, and Systems Landscape for ledger-based expense reporting. Expertise in gathering and understanding end-to-end business requirements and deploying solutions across the newly developed landscape
- Established Global SAP General Ledger as 'Single Source of Truth' for USGAAP & US/Local Stat reporting and Management Reporting with Common Finance Language code blocks. Standardized global FX Design and implementation for USGAAP & Local Stat. Work with Corporate IT and Business Sponsors for selection of Finance Systems & Applications. Enabled decommissioning of legacy systems and centralizing the Finance System Support
- Rolled out SAP GL functionality across 80+ countries and migrated multiple local GL systems. Migrated legacy applications to SAP Fixed Assets & Accounts Payable globally. Integrated Ariba (Procurement), Concur (T&E), Investments applications to global SAP GL. Rolled out Enterprise SAP functionality to large acquisitions and migrated from Legacy Systems
- Led risk and compliance initiatives for large-scale finance transformation projects, ensuring alignment with regulatory mandates.
- Conducted root cause analyses to address complex risk issues, delivering strategic recommendations for governance improvements.
- Directed the rollout of SAP General Ledger across 80+ countries, establishing a unified reporting standard and enhancing compliance.
- Championed transformation projects, establishing scalable frameworks for reporting, compliance, and governance.
- Designed future-state operating models, enabling seamless adoption of global SAP General Ledger across 80+ countries.
- Directed risk management strategies, reducing compliance breaches by 25% through innovative process enhancements. Executed Lean/Six Sigma-driven process optimizations, achieving \$15M annual savings.
- Defined new operating models, integrating Ariba, Concur, and SAP Fixed Assets & Accounts Payable to improve automation.

**QBE**, New York, NY (April 2012 – October 2014)  
*Tech Lead - Finance Transformation*

- Held a multifaceted role within the Finance transformation program to ensure a smooth transition across multiple waves
- Enhanced efforts throughout Finance in identifying process improvement. This includes eliminating manual efforts, better utilization of current systems, new technologies, and better communication efforts throughout the organization.
- Supported the transformation leader while leading a team of four people in the restructuring and downsizing of the IT department by 65% for offshoring
- Oversaw the development and deployment of systems to support large-scale organizational transformations.
- Established standards for initiative scoping and delivery, improving team efficiency and project outcomes.
- Optimized communication and reporting processes, enhancing transparency and stakeholder satisfaction.
- Directed process improvement initiatives, leveraging automation and new technology to streamline workflows.
- Managed restructuring efforts, optimizing IT resources while ensuring continuity of key financial functions.
- Enhanced reporting structures, supporting business growth and scalability

**E2E Advisors** - New York, NY (January 2010 – March 2012)  
*Senior Consultant - Financial Business Operations*

- Consulted on strategic operations and client service enhancements, playing a pivotal role in the development of client-focused business strategies and operational improvements.
- Identified and created strategies to help support the growth of QBE business
- Consulted on SAP migration strategies, automating processes and reducing operational inefficiencies.
- Led process re-engineering efforts for accounting functions, enabling cost-saving measures.
- Participated in process re-engineering efforts for our specialty and middle-market accounting functions
- Worked as a Modeler / Architect to support the migration to SAP from PeopleSoft / Oracle legacy system

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## **EDUCATION**

Richard Stockton University (May 2008)  
*Bachelor of Business Administration and Management*

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## **CERTIFICATION**

**Certified ScrumMaster (CSM),**

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### **Core Competencies:**

- **Strategic Project Management:** End-to-end delivery of strategic initiatives, including process reengineering and risk mitigation.
- **Operational Efficiency:** Implementing process improvements to achieve measurable cost savings and productivity gains.
- **Stakeholder Engagement:** Building strong relationships across teams to align project goals with business objectives.
- **Technology Integration:** Advanced proficiency in Microsoft Project, Excel, PowerPoint, and emerging AI/ML tools.
- **Regulatory Compliance:** Expertise in governance and risk management to ensure adherence to organizational standards.

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### **Technical Skills:**

Financial Optimization, Process Optimization, Business Process Improvement, Change Management, Software Development Life Cycle (SDLC), Project Delivery, Business Analysis, Business Strategy, Stakeholder Engagement, Project Management, Agile Scrum and Kanban methodologies, GAAP, Financial Reporting, Process & Control Mapping/Documentation, Financial Systems Architecture, Process Learning and Re-engineering, Microsoft Office including Excel, Word, PowerPoint, Visio, Tableau, Power-BI, SAP S/4 HANA, SQL, Oracle, Workday, Access, and AI-driven products.