

Sr. Contract Consultant – Project Manager | Analyst | Technical Writer | Trainer

Independent professional specializing in researching and writing policy, procedure, product offerings, quality assurance and mapping end user processes. Effectively collaborates in alignment with management's initiatives and deadlines through clear communication and documentation. Excels at handling a number of projects efficiently and expeditiously.

Proficiencies:

- **Technical Writing and Publishing**
 - ✓ Internal and external publications / Stateside and Off Shore
 - ✓ Policy, QA, process and procedure development and management
 - ✓ Corporate document templates – Including web and document library reference links
 - ✓ User-friendly PDF fillable forms and job aids
 - ✓ HTML, AllRegs and SharePoint publishing
 - ✓ Third Party Scorecard Risk Assessment and Reporting
- **Training / Instructional Design**
 - ✓ Develop and deliver impactful training materials with supporting job aids
 - ✓ Internal and external client training
 - ✓ Impact assessment and progress reporting
 - ✓ Classroom / Virtual / Recorded
- **Project Management**
 - ✓ Multi-department collaboration - Research / Solutions / Tracking-Reporting / Deadline Management
 - ✓ Clear, concise reporting to stakeholders, management and subject matter experts
 - ✓ Straightforward communication and follow up
 - ✓ Maintain and publish up to date progress and action plans
 - ✓ CAPM certification in progress
- **Business / Systems Analysis**
 - ✓ **Compliance / QA / Risk Assessment** – Evaluate internal controls, conduct, test and verify compliance with policies, procedures, and other regulatory requirements
 - ✓ **Test Script** Development, Implementation and Management with Excel
 - ✓ **Process Improvement** - Configuration / Testing and Deployment / Validation
- **Systems / Technology**
 - ✓ **Publishing** – HTML, Wiki, SharePoint, AllRegs, Google Intranet and other proprietary publishing platforms
 - ✓ **Microsoft Office Suite** – Developer in Word, Excel, Power Point, Visio
 - Create Excel dashboards and advanced reports with custom functions and security
 - Develop Excel Test Scripts for system testing – Maintain and report updated results
 - ✓ **SharePoint**
 - Development, Deployment and Administration (since 2010)
 - Collaborate with initiative owners and department managers for effective site content, resources and reporting
 - ✓ **Mortgage Specific Systems** – Calyx, Encompass, Net Oxygen, Empower, Black Knight, DataTrac, Lending Space, Loan Sphere, DocVelocity, DocMagic, Mavent, AUS, Lexis Nexis, CMS and various lender proprietary software systems.
 - ✓ **Systems Compliance Testing** - Write Excel Test Scripts / Manage Testing Team / Maintain and Report Results
 - ✓ **LOS System Conversion** and Deployment – SME / UAT
 - ✓ **Advanced WebEx** – Interactive Training / Recorded Sessions / Online and Retention Assessments / Reporting

Professional Experience – Senior Contract Consultant

Consultation Partners: OpExNOW / Beaconhill / Signature Consultants / Newbold Advisors

Carlyle Financial (Correspondent/Warehouse)

Compliance Manager / Process Quality and Procedure Consultant / Project Manager

Current

- Manage Compliance, QA and Risk Initiatives
- Delegate and Audit for Accuracy
- Process Management Consultant

Home Point Financial / Stonegate (All Business Channels)

Systems Configuration and Implementation / Technical Writer

August 2017 to December 2017

- Compose and re-write Policy, Procedure, Internal and External Communications
- Compose Project Tracking in Excel and Maintain Updates for content owners and management
- Visio workflows – All departments/channels
- Custom forms – Word and Excel auto format
- Acquisition updates – Update all logos and legal disclaimers in policies, procedures and forms

Conifer Healthcare (Financial Division)

Tools and Technology Solutions / Technical Writer Specialist / Internal Communication Development

May 2017 to August 2017

- Manage a multi-faceted project for the composition and publication of current and accurate role specific process flows, procedures and escalations
- Create and maintain project progress reporting for leaders and contributors
- Compose and publish robust visual aids and procedures

Bank of Oklahoma (Wholesale and Correspondent)

Technical Writer / Process and Capacity Consultant / Internal and Correspondent Client Communications / Appraisal Vendor Management

January 2017 to March 2017

- Create custom forms for use in SharePoint
- Develop Appraisal Management policy and procedures in SharePoint
- Write process maps and policy for the following:
 - Internal Appraisal Panel Oversight / High Level Policy in Word
 - Adding / removing internal Appraisal Panel Members from approved list in Excel
 - Updating and communicating Appraisal Panel pricing Excel report
 - Managing internal complaints by creating department and escalation mailboxes in Outlook/SharePoint

Bank of America (Forward Mortgages – All Channels)

Developer / Technical Writer / HTML Publisher

October 2016 to December 2016

- Compose policy and procedures for appraisal and risk review, internal and external escalations, regulatory requirements, QA and process flows. Executive Summary Progress Reports
- Relocate existing policy and procedures from existing online document source repository to a new system
 - Add, replace and repair search engine document tags / Manage online cases for document groups (including approval levels for each project phase) / Re-publish / Report data errors

Prospect Mortgage

Investor Remediation Consultant (Post-closing file review and remediation)

July 2016 to October 2016

- Lead a diversely qualified team to identify and cure deficiencies with four major banks, lenders and multiple Bond agencies. Report systemic recommendations and testing to management.

City National Bank

Consultant / Document Compliance Testing Team Manager

March 2016 to May 2016

- Write complete test scripts in Excel / Compile daily test results including pass/fail data
- Collaborate with internal and external developers and management to resolve system issues

Homestreet

Compliance Consultant / TRID Testing / Reporting

November 2015 to January 2016

- Manually calculate Truth in Lending and APR system calculations to validate system calculations
- Research errors identified and report to Executive Management and Developers

Non-Contract / Direct Hire Professional Experience

Citibank

AVP – Relationship Manager II – Correspondent Scorecard Analysis and Client Development

September 2014 to October 2015

FGMC

Compliance & Policy Tech. Writer, Systems Consultant / Trainer

(Contract-Direct) February 2014 to May 2014

Pacific Union Financial

National Retail Operations Manager / Special Policy, Procedure and Compliance Project Management

(Lay-Off) August 2012 to December 2013

GENPACT Mortgage Services

Senior Manager (Mortgage Operations)

February 2012 – August 2012

MetLife Home Loans

Nat'l Business Instructor / Correspondent LOS Systems Analysis, Improvement and Deployment / Risk & Compliance SME

(Closed May 2012) September 2010 – February 2012

CitiMortgage

National Client Services / Credit Review Specialist / RESPA 2010 SME

2007 to September 2010

American Dream Mortgage

Owner / Broker

2000 to 2007

Bank One / Team Bank / Empire of America / Equitable Savings

Branch Manager

Pre-2000