**James R. Terrell, Jr.**

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**Summary**

Hard working, knowledgeable professional who has led and worked on several client engagement in both the agile and waterfall methodologies.

**Relevant Skills**

* Financial analysis
* Requirements management
* Process modeling
* User acceptance testing
* System testing
* Product design analysis
* Program design and evaluation
* Technology solution design and evaluation
* Microsoft Product Suite
* SQL Server (moderate)
* SAS (basic)
* Java (basic)
* JavaScript (basic)
* Python (basic)
* HTML (moderate)
* Team Foundations Studio (TFS)
* Jira

**Work Experience**

**Trustage (*formerly CUNA Mutual Group*), Madison, WI 2023 - Present**

**Technology Analyst III, IT Corporate Services**

* Business process analysis.
* Technical analysis.
* Solution development.
* Test case development and testing execution.
* Lead requirements management.

**CUNA Mutual Group, AdvantEdge Digital, Madison, WI 2021 - 2023**

**Senior Business Analyst, Product Delivery**

* Led requirements management.
* Supported test case development and testing execution.
* Product Design (analysis).
* Conducted analysis of FinTech and credit union industries.
* Collaborated with team on ways to improve/enhance the business analysis practice.

**University of Wisconsin Credit Union, Madison, WI 2018 - 2021**

**Business Analyst II, Project Services**

* Elicited requirements by use of interviews, workflow analysis, and requirements workshops to provide business process descriptions, business requirements, use cases, and user stories.
* Supported quality assurance through test plan and script creation.
* Developed and coordinated business analysis consulting and mentorship program to be offered to internal business unit and resource staff.
* Developed and deliver workshops on business analysis and facilitation to interested internal staff.
* Led department in collaboration with other Business Analysts in creation and maintenance of business analysis documentation standards.

**CUNA Mutual Group, Madison, WI**

**Enterprise Data Analyst, AdvantEdge Analytics 2016 - 2018**

* Elicited requirements using interviews, workflow analysis, requirements workshops, and surveys to provide business process descriptions, business requirements, use cases, and user stories.
* Collaborated with project team members (developers, architects, product owners) to establish the technical vision and analyze tradeoffs between usability and performance needs.
* Supported quality assurance through test plan and/or script creation and QA team collaboration.

**CUNA Mutual Group, Madison, WI**

**IT Business Analyst (contractor), Lending Operations March 2016 – July 2016**

* Ensured that the requirements of business clients were captured and documented correctly before a solution was developed.
* Collaborated with diverse stakeholders to elicit, analyze, represent and validate requirements for changes to business processes, policies and information systems.
* Microsoft Access and SAS query execution.
* Updated data in XML files.
* Tested lending applications.

**Robert W. Baird & Co., Milwaukee, WI**

**Business Analyst II, Information Technology – Project Services 2015 - 2016**

* Elicited requirements through interviews, workflow analysis, requirements workshops, and surveys which provided business process descriptions, business requirements, use cases, and user stories.
* Collaborated with project team members (developers, architects, product owners) to establish the technical vision and analyze tradeoffs between usability and performance needs.
* Performed analysis of potential solutions against business requirements and financial impact which helped identify the best solution for the business.
* Supported quality assurance through test plan and/or script creation, QA team collaboration, and project team validation.
* Assisted project managers in defining project milestones, based on business need, requirements, and defined solution.

**CUNA Mutual Group, Madison, WI** **Business Analyst II, Project Management Office** **2011 - 2015**

* Ensured that the requirements of business clients were captured and documented correctly before a solution was developed.
* Collaborated with diverse stakeholders to elicit, analyze, represent, and validate requirements for changes to business processes, policies, and information systems.

**Public Consulting Group, Inc., Boston, MA Consultant 2009 - 2011**

* Developed business proposals and conducted presentations to prospective state and local government clients.
* Designed strategic planning initiatives along with Senior Consultants and Managers.
* PCG corporate liaison to the Wisconsin Department of Health Services.

**Public Consulting Group, Inc., Boston, MA Business Analyst 2009 - 2010**

* Conducted long-term care and behavioral health market research.
* Designed long-term care and behavioral health product line offering along with Senior Consultants.
* Worked on various Medicaid and healthcare policy projects.

**Massachusetts Office of Medicaid (MassHealth), Boston, MA Business Analyst 2007 - 2009**

* Provided technical support to Deputy Director of Policy Implementation & Evaluation Services.
* Provided technical support to Deputy Director of MassHealth Operations.
* Conducted regular and comprehensive financial analysis and report on short- and long-term financial stability of major platform operations contracts.
* Coordinated and manage performance reporting from vendors.
* Assisted in the development and preparation of contracts, amendments, task orders and other documents.

**Massachusetts Department of Early Education and Care, Boston, MA**  **Administrative Coordinator of Procurement and Contracting 2006 - 2007**

* Participated in the procurement of childcare services by having assisted in researching vendors, drafted and reviewed drafts, evaluated and awarded contracts.
* Responded to phone and email inquiries. Provided technical assistance regarding the fiscal management of contracts including contracting regulations, slot, rate, funding information and contract compliance.
* Updated the Director of Contracting on contract-related issues and communicated with the Systems Unit and Budget Unit as well as other units of the Department to prepare regular and ad hoc reports.
* Fielded appropriate calls and email communications to the Assistant Director of Audit Resolution and the Contract and Monitoring Unit staff.
* Managed data collection on initiatives piloted through funding by the Department. Entered data on the service delivery of funded pilot programs accurately in spreadsheet format, ensured that data was current, reported data to senior managers and the Director of Special Projects, aided Department staff on the completion and maintenance of spreadsheets.
* Performed other related office duties such as data entry of staff training records and supported the Department’s records conversation program for Central Office.

**Massachusetts Department of Early Education and Care, Boston, MA**  **Business Analyst 2005 - 2006**

* Conducted research into legal issues.
* Performed database entry and clerical work for Director of Special Projects.
* Performed employee training work for the Director of Human Resources (involved working with Budget Dept. personnel).
* Processed requests from contractors for reimbursement for eligible childcare services (under the direction of the Director of Contracting).
* Information Technology Dept. User Services Team member (Helpdesk technician).

**Education**

**Suffolk University, Sawyer Business School, Boston, MA 2003 - 2007**

* Master of Public Administration (State and Local Government)

**Butler University, Indianapolis, IN 1999 - 2003**

* Bachelor of Arts, Political Science

**Additional Qualifications**

**CERTIFICATION**

* Certified Associate in Project Management (CAPM), Project Management Institute, 2011
* Certified Business Analysis Professional (CBAP), International Institute for Business Analysis, 2013
* Professional Scrum Master I (PSM I), Scrum.org**,** 2016
* Lean Six Sigma Yellow Belt Certificate, Wisconsin School of Business – Center for Professional and Executive Development, 2020

**LEADERSHIP**

* Vice President, Membership (MA chapter), American Society for Public Administration
* VP, Marketing & Communication (Madison chapter), International Institute for Business Analysis
* Board Member, Lussier Community Education Center, Madison, WI

**TRAINING**

* Professional Scrum Master (PSM) course (Centare & Scrum.org)
* Brainshark Professional Presentations Training
* Public Consulting Group Career Development Program: CON/101: Writing at PCG, CON/102: Time Management, CON/103: Project Management Concepts, CON/104: Proposal Mechanics, CON/105: Data Analysis I

**PROFESSIONAL RECOGNITION**

* Paul G. Keough Award recipient, MA Chapter of the American Society for Public Administration, 2006
* Medicaid Director’s Award recipient, Massachusetts Office of Medicaid, 2008