

FRANCESCO BERTOLINI

BACKGROUND

Francesco is a Senior Manager at PwC Advisory, within the "Technology Financial Services" area.

He has **20 years of work experience** gained mainly in leading consulting companies, where he was able to participate and manage complex IT projects in the **Banking and Financial sector, controlling and monitoring project progress against time and budget**

Francesco in his experience has been involved in complex projects in the banking sector, thanks to which he was able to broaden his knowledge and skills in the design, analysis and **development of integrated solutions Front To Back.**

He has an excellent ability to manage projects and programs even in international environments showing strong skills in **Project and Program Management.**

In past years, Francesco has also been able to deal with problems related to the **Software development**, participating in projects that included analysis and development of custom solutions or the integration of SW market. The direct experience in SW development issues and in IT integration projects, linked to a broad knowledge of business and functional aspects in the Financial Services area, have allowed Francesco to acquire the necessary sensitivity to be able to face, in the following years, the role of Program Management in complex projects collaborating with all the actors involved and coordinating heterogeneous working groups with specific skills. Thanks to this mix of IT and functional skills, Francesco was directly involved in **IT Due Diligence** within broader M & A programs, where the capacity for functional, process and technical analysis of the solutions involved, was required.

Before joining PwC Advisory, he worked at BE Consulting, Exprivia, HP Italy and Cap Gemini and Ernst & Young, taking on roles of responsibility in projects in the Financial Services sector and personally managing the Customers and P & L of their teams.

MAIN CLIENTS

- Banca IMI
 - DSI (Intesa San Paolo)
 - Societe Generale Securities Services
 - CCB (Cassa Centrale Banca)
 - UniCredit Business Integrated Solutions
 - Cedacri
 - Banca Fideuram
 - Generali
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CAREER

- PwC Advisory (Senior Manager) [July 2014 – Present]
- BE Consulting (Executive Manager) [2011 - 2014]
- Exprivia (Delivery Manager) [2010-2011]
- HP Italia (Customer Program/Project manager) [2007-2010]
- The Technology Partner (Bain Company) (Project Manager) [2005-2007]
(Azienda acquisita poi da HP Italia)
- CGI (Senior SW Developer) [2004-2005]
- Capgemini Ernst& Young (Project Manager) [1999-2003]
- Other Experiences (SW Developer) [1996-1999]

EXPERTISE AREA

- IT Strategy
- Program Project Management
- Delivery
- Data Governance
- System Integration
- Data Migration

MAIN EXPERIENCE

GDPR PROJECT [PWC – HEAD OF TEAM (6 RESOURCES)]

As part of a program launched by a primary Banking Group, the project aimed to identify the most appropriate architectures and technological solutions to guarantee an adequate level of personal data protection not only for traditional ICT platforms (Mainframe and Open) but also for emerging technologies (Data Analytics, Big Data)

Responsibilities:

- Assessment of the technological solutions present in the application landscape of the Bank;
- Definition of a strategy based on the best functionalities and ICT products to meet the regulatory requirements and the requirements of Business Protection and Privacy Offices;
- Definition of a high-level roadmap and estimation of the implementation effort;
- Scouting on the market of technological solutions, GDPR compliant, suitable for the context of the Banking Group.
- POC execution of Data Discovery, Tokenization, Transparent Data Encryption.
- P&L management (350K)

IFRS9 PROJECT [PWC – HEAD OF THECNOLOGY STREAM (5 RESOURCES)]

Methodological support to a primary banking group for the implementation of the new accounting standard IFRS9. The aim of the project was to define the application and process impacts following the implementation of the new accounting standard (IFRS9)

Responsibilities:

- Application and process assessment on the impact deriving from the classification and measurement phase of financial instruments (securities and credits)
- Application and process assessment on the impact deriving from the Impairment phase
- Technical analysis support

- Support for SW Selection for the selection of the SPPI Test service
- Definition of Test Case
- Technological PMOP&L management (750 K)

IT DUE DILIGENCE [PWC – HEAD OF PMO TEAM E FUNCTIONAL ANALYST TEAM]

IT Due Diligence requested by the primary banking group to evaluate a possible recourse to the complete outsourcing of applications and processes, provided by a leading company in outsourcing services for the banking sector and financial institutions.

Francesco was appointed as head of the group of PMOs and Functional Technical Analysts (20 resources team), with the aim of supporting the Outsourcer in the performing of the IT assessment, in the application Gap analysis and in the definition of the business model and the strategic master plan related to the onboarding of the new banking group.

Responsibilities:

- Head of the PMO and functional Teams
- Support in application and process GAPS
- Support for defining the methodological approach to system migration
- Definition of the strategic master plan and capacity plan

IT Due Diligence [PwC – Subject-matter expert]

In the broader Merge & Acquisition program, the IT Due Diligence was requested by a leading Banking Group to assess the functional and application coverage of the systems in place at a foreign private bank and to assess the costs of the application infrastructure and its scalability. Francesco has been involved in activities as IT Specialist.

Target 2 Securities [PwC – PM and PMO]

Definition, start up and management of the migration to the T2S platform for one of the main Italian Banks that has joined as Direct Participant in the new platform.

Francesco assumed the role of head of the PMO group in support of the client. Thanks to his technical abilities and to his functional background in Financial sector and Asset Service, he has stand out as key resource, facilitating the interaction between IT and Operation Bank team.

Responsibilities:

- Head of PMO Team (10 resources)
- Responsible for the process of monitoring and reporting of activities
- Responsible for project risk management
- Head of Management Reporting
- Responsible for the Test Factoring
- Support for the design and implementation of the SWIFT architecture for connection to the T2S platform
- Definition of the migration and post-migration process
- Responsible for the migration operational plan

Data Governance [PwC – PM]

Support to primary Italian Bank for the launch of a Data Governance program. The objective of the project was to start a process that would allow the Bank to define a process of Data Governance by combining the principles provided by the law (Circular 263/285 of the Bank of Italy)

Francesco was included in the project as PM, with the aim of defining a qualitative Business Case that would allow the bank to have the necessary elements to evaluate the impact of the path it would have had to face in the following years.

Responsibilities:

- Process assessment and preparation of questionnaires for the mapping of information and data subject to Governance
- Business Glossary definition
- Support for SW Selection for Data Governance and Data Quality tool
- Definition of the guidelines and standards of Data Governance
- Definition of the mid-term Roadmap and the qualitative Business Case.

Architectural transformation program (Head of PMO and SME)

In a broader architectural transformation program initiated by a leading investment bank, Francesco was appointed as PMO manager of the stream dedicated to the architectural review of the Post Trading chain. The objective was to integrate the "Calypso" (market solution platform) into the new architecture, with the consequent disposal of 20 legacy systems. Francesco has assumed the role of head of the PMO team (7 people), managing project and inter-project monitoring activities. Thanks to the proven experience in the field of integration and the high Knowledge of the bank application landscape, Francesco has also taken on the role of SME to support the customer in design choices.

Responsibilities

- Activity monitoring and definition of project interdependencies with the other program streams..
- Management of communication with stakeholders and customers
- Risk management and monitoring
- Methodological Support to Lean Project Management
- Methodological support for the definition and execution of the tests
- Responsible for the Test Factory

OTHER BANKING AND FINANCIAL EXPERIENCE (PM AND P & L ACTIVITY MANAGEMENT)

Previously, Francesco has worked in other consulting firms, being able to participate in various initiatives in the Financial Services area, managing customers, delivery and having responsibility for the P & L of their teams

Francesco has personally followed also SW implementation projects in the Capital Market field as team manager and taking on the role of IT Specialist.

- Proof of Concept at a primary banking group, aimed at creating an aggregation Layer that was the only point of connection between Balance Sheet Data and Accounting data and was compliant with the PERDAR principles according to the BCBS Directive 239
- Report Solutions Based on Data Warehouse.
- Development of a custom accounting management reconciliation tool.
- Design, Development of a Securities Lending solution, which has become the target solution for a leading bank in the sector and one of the most advanced in the Italian market.
- Migration and integration projects (Murex, and Post Trading Applications)
- Application Maintenance activities.

Other Experience :

Francesco, at the beginning of his work experience, also had the opportunity to face the SW design and development in Vocal Technology field, collaborating in the design and production, in collaboration with Magneti Marelli and the Scientific Institute of Trento, of a prototype of Mobile Office complete Vocal interface.

EDUCATION AND LANGUAGE

PISA UNIVERSITY

Master's Degree in Computer Sciences (1991-1996)
 Good knowledge of written and spoken English

PERSONAL INFORMATION

Birth Date: 02/06/1971
 Civil status : Married

TECHNOLOGY SKILL

In his work experience, Francesco has been able to work on projects that have allowed him to learn more or less in depth knowledge, different solutions and technologies in the field of Software Development, Systems Integration and Testing.
 J2EE, Jdeveloper, Eclipse, Oracle OC4J, Oracle Weblogic, Oracle DBMS, Ant, DB SQL Server, ORACLE DBMS, PLSQL, Unix Script, HP Quality Center, IBM Message Broker, SAS Visual Analytics, SA Data Management, SWIFT Messaging

Autorizzo il trattamento dei dati personali contenuti nel mio curriculum vitae in base all'art. 13 del D. Lgs. 196/2003 e all'art. 13 GDPR (Regolamento UE 2016/679) ai soli fini della ricerca e selezione del personale.