

How Your Job Appears through TalentOcean

Role Details for Your Job (173 - CPMTO_014) Finance BI Project Manager

Company (not disclosed):	ConnectingPM (E-Solutions)	Date Produced:	11 February 2023
Number of Reporting Staff:	1	Date Published:	09 February 2023
Primary Industry:	Finance/Banking	Location/Time Zone:	Tampa, FL, USA
Remote Opportunity?:	Not Available	Language Requirements:	English
Work Visa Requirements:	United States	Security Clearance:	None
Job Type:	Full Time	Job Term:	Permanent
Monthly Rate (€):	15000	Primary Methodology:	Waterfall
Required Certifications:	PRINCE2 / Waterfall		

Job Description for Your TalentOcean Role

Position:	On-site project management for the migration and operational maintenance of budget, financial and data analysis tools.
Responsibilities:	To build out a data analytics database, to pull the data together regularly, leveraging Tableau for reporting, allowing us to move away from Excel as a data aggregator and reporting tool.
Prerequisites:	At least 7 years' experience in project and budget financial data analysis. Banking experience. Relevant experience in financial management. Excellent Microsoft Excel manipulation skills. Prior experience in interacting with senior stakeholders from the client side.
Reporting to:	Senior Management Positions.

Interview Pre-Selection Questions for Your Role

Question 1:	What are the steps you would take to investigate the existing data aggregation tools and techniques we have applied?
Question 2:	How would you approach the migration of data aggregation from Excel to Tableau?
Question 3:	What methods would you use to display Business Intelligence analytical data to a senior management team?
Question 4:	What is your standard approach for the delivery of a data analysis migration project?
Question 5:	Please indicate your experience with both Microsoft Excel and Tableau, as data aggregation and Business Intelligence reporting tools for Financial Data.

Skills and Competencies Required for Your Role (Max: 12)

Versatility:	4	Integration Management:	12
Cooperativeness:	8	Scope Management:	8
Cultural Awareness:	4	Schedule Management:	4
Self-Discipline:	12	Cost Management:	12
Integrity:	12	Quality Management:	12
Personal Comms:	12	Resource Management:	4
Diversification:	4	Comms Management:	12
Industry Knowledge:	8	Risk Management:	4
Leadership Skills:	4	Procurement Management:	4
Management Skills:	8	Stakeholder Management:	12
Professionalism:	12	Project Tools:	12

Your Job Applicant Match - Complete Profile

Rosie Mustermann

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Rosie's Details (CPM252)

Core Industry:	Information Technology	Desired Rate (€/Month):	15000
Available Date:	01/03/2023	Proficient Languages:	English Dutch Spanish
Working Visas:	United States Netherlands	Certifications:	MSP Agile / Scrum PMI
Work Location:	Netherlands	Security Clearance:	None

Rosie's General Interview Responses

Introduction – in their own words: Extremely motivated to help companies mitigate risks to projects and protect professional services revenue. I am confident in my ability to continuously improve the people, processes and technologies supporting business and customer-facing functions.

What led you to become a project manager? As an athlete, I thrive in team environments. This manifested into my professional IT career, starting as a DBA - being isolated - and aspiring to work more closely with other team members.

What do you believe is the most important part of being a project manager? Knowing the goals which drive deliveries and having the motivation to achieve them across multiple disciplines, people, processes and technologies. Understanding individuals - what drives them, what inspires them - and managing their success.

As a project manager, what is your greatest achievement? My transition from nationwide to international and global roles - managing diverse cultures and work ethics across all levels to hire, manage and to achieve program goals, KPIs, SLAs and leveraging multiple skills and competencies.

What is your greatest PM challenge and how did you overcome it? Working with individuals who not only have an unprofessional manner but also attempt to undermine my capabilities. I reset expectations and re-defined goals, communicated those elements clearly to all parties and delivered on time, in scope and in budget.

Where would you like to be in 5 years' time? Working with individuals who not only have an unprofessional manner but also attempt to undermine my capabilities. I reset expectations and re-defined goals, communicated those elements clearly to all parties and delivered on time, in scope and in budget.

Rosie's Role Interview Responses

What are the steps you would take to investigate the existing data aggregation tools and techniques we have applied?: To gather the raw data elements in the data warehouse and define the fields, interconnectivity between elements and map them out prior to defining a transition plan.

How would you approach the migration of data aggregation from Excel to Tableau?: Tableau is able to utilize Excel as a direct data feed. Consideration would need to be given as to whether users need to have direct or indirect access to the data input (tools).

What methods would you use to display Business Intelligence analytical data to a senior management team?: Depending on the stake holder role (C Level, Operations, Developers, etc.) I would use Tabular Views, Pie, Gantt or a mix of these in a Report or interactive UI for end users.

What is your standard approach for the delivery of a data analysis migration project?: As with many other IT lifecycle project: gather requirements, design, development, testing, UAT, implementation and support or QA.

Please indicate your experience with both Microsoft Excel and Tableau, as data aggregation and Business Intelligence reporting tools for Financial Data.: I have worked with Excel since it's inception and Tableau for the last 2-3 years. In both instances I have worked in Business Finance and Commercial (B2B/B2C) Banking, over that time.

Rosie's Recent Job History

Start Date: Jul 2007 Maximum Number of Staff Managed: 75 Highest Engagement Level: CTO Chief Technology Officer About the Role: Establishing program management offices for multiple transformation programs, implementing governance framework, staffing strategies, applying optimizations and re-organizations to align with business goals.	Job Title: Senior Consultant Average Length of Projects: 12 Months Methodology Used: PMI
Start Date: Apr 2018 Maximum Number of Staff Managed: 100 Highest Engagement Level: CEO Chief Executive Officer About the Role: Focused on delivering customized solutions and ensuring the highest quality of deliverables to tech companies. Responsible for the deployment of consulting programs to rationalize people, processes and technologies, maintaining quality services.	Job Title: VP Professional Services Average Length of Projects: 6 Months Methodology Used: MSP
Start Date: Jul 2020 Maximum Number of Staff Managed: 10 Highest Engagement Level: CEO Chief Executive Officer About the Role: As a CEO, delivered consulting and management services, supporting C Level leaders and stakeholders for a global organization. Activities included collaborating with the leadership teams to improve performance in operational and transformational programs.	Job Title: Business Owner Average Length of Projects: 12 Months Methodology Used: Agile / Lean

Skills and Competencies – How Rosie Matches up to your Role

Shown below are your Role requirement Scores (in **Blue**) and the Applicants Assessment Scores (in **Green**), for your consideration:

Versatility:	4 vs 12	Integration Management:	12 vs 10
Cooperativeness:	8 vs 11	Scope Management:	8 vs 11
Cultural Awareness:	4 vs 11	Schedule Management:	4 vs 10
Self-Discipline:	12 vs 11	Cost Management:	12 vs 10
Integrity:	12 vs 10	Quality Management:	12 vs 12
Personal Communications:	12 vs 11	Resource Management:	4 vs 12
Diversification:	4 vs 10	Communications Management:	12 vs 5
Industry Knowledge:	8 vs 10	Risk Management:	4 vs 11
Leadership Skills:	4 vs 10	Procurement Management:	4 vs 11
Management Skills:	8 vs 11	Stakeholder Management:	12 vs 5
Professionalism:	12 vs 10	Project Tools:	12 vs 5

Rosie's Personal Excellence Standards Appraisal

A senior, experienced project manager who can be deployed to work independently or in a remote situation within any organization. They are suited to working in any enterprise, corporate or small business environment. Their experience working within international teams and with diverse cultures is well proven. Their experience in designing, devising, developing and delivering IT projects make them an asset at any level. Overall an professional character who brings a wealth of knowledge and experience.

Rosie's Soft Skills Assessment Appraisal

Personally, a seasoned individual, capable of operating within medium and large organizations, capable of providing guidance and nurturing more junior members of the project team in a growing organization.

Versatility:	● Works well across all delivery structures and responds well to unplanned changes.
Cooperativeness:	● A very good influencer who is able to maintain relations across multiple distributed delivery teams.
Cultural Awareness:	● Demonstrates experience working with multiple nationalities and recognizing the cultural needs of individuals.
Self-Discipline:	● Maintains an authoritative approach to disciplinary actions with individuals and teams.
Integrity & Honesty:	● Demonstrates their integrity through their deeds and actions across a project team and with stakeholders.

Rosie's Professional Assessment Appraisal

Professionally, an exceptional professional individual who would be very well suited to represent a business enterprise as a flagship project management provider for enterprises, businesses (B2B) and business to consumer (B2C) scenarios.

Personal Communications:	● An excellent communicator who applies sound principles in disseminating information, listening effectively and being able to interpret feedback.
Industry Knowledge:	● Works well across multiple industry verticals, maintaining and augmenting their knowledge as appropriate.
Diversification:	● Able to maintain a perspective and apply principles across multiple disciplines or industry verticals.
Management Skills:	● Commands a team and manages stakeholders through demonstrated industry strategies, methods and tactics, maintaining a high level of project management.
Leadership Skills:	● Demonstrates leadership traits with the ability to drive larger project team members and deliverables.
Professionalism:	● Demonstrates a high degree of professionalism in their day-to-day tasks, correspondence and bearing.

Rosie's Practical Assessment Appraisal

A a project manager, practically speaking - an exceptional project leader who relishes the challenge of large, complex project deliveries within small, medium or large organizations. A self-starter with the experience and knowledge to create a fully-formed project plan for delivery.

Cost Management:	● Able to plan and define cost elements across all aspects of project planning and execution, including 3rd party costs.
Scope Management:	● Able to create project scopes for multiple work streams, teams and stakeholders across national and international deliveries.
Integration Management:	● Maintains a high level of diligence in combining projects, programs and delivery lifecycle elements from multiple sources.
Quality Management:	● Has extensive experience with quality assurance measures, management and execution across the lifespan of a project.
Schedule Management:	● Has a sound knowledge of scheduling for projects and able to re-define or restructure a schedule based on extenuating circumstances.
Risk Management:	● Conducts risk management as an intrinsic part of project deliveries, including accountability, RACI and other methods for effective risk management.
Stakeholder Management:	● Creates a strategy to define stakeholders, SME's, Champions, Advocates, Power Users and other entities for use across functional areas of a project.
Resource Management:	● Able to manage multiple teams and groups, internally and externally, including stakeholders, 3rd parties, suppliers, vendors, etc.
Procurement Management:	● Creates a pipeline for procurement, ensuring the needs of the business are met, while applying methods to negotiate best quality, cost and time considerations from suppliers and vendors.
Comms Management:	● Maintains a high degree of communications management across multiple channels, parties, workstreams and technologies.
PM Tools and Processes:	● Able to create an effective project management strategy within provided project management tools, software, solutions and interfaces.

For any enquiries about this role definition, personal assessment or advanced appraisal please contact:

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