

Adit Vasant Shah

Mumbai 400004 | +91 9819085235 | aditshah@alumni.stevens.edu

LinkedIn - <https://www.linkedin.com/in/aditshah/>

In pursuit of challenging and fulfilling assignments in Program/Project/Product/Change Management & Business Analysis within the Banking and Financial Services, Consulting & IT sectors with a growth-oriented organisation.

- A dynamic professional with approx. 25 years of rich experience in Financial Services and Information Technology sectors with well-known organizations.
- Extensive background in Program/Project/Product/Change Management & Business Analysis; including Strategic Planning, Team Management, MIS & Reports, etc.
- Project Management Professional (PMP) from PMI USA.
- Extensive global and local experience in the Mutual Fund Industry. Have worked with most divisions/departments within the Asset Management organisation.
- Strong people engagement skills.
- Established record in providing end-to-end custom business solutions resulting in value generation.

EXPERIENCE

Consultant & Mutual Fund Distributor

Sep 2021 – Present

Adit Vasant Shah., Mumbai

Role:

- Developing Custom Software for Financial Services and Media companies
- Vendor Management, Change Management, Business Analysis, Project Management, Testing
- Integration of organizations
- Building the Sales organization by identifying potential distributors and customizing a CRM
- Worked on avoiding Capital Intensive models and focused on Operational Intensive models
- Helping Investors make smart choices with Mutual Funds, Life Insurance, Health Insurance and Deposits

Clients:

WhiteOak Capital Asset Management Ltd., Mumbai

Sep 2021 – Jun 2022

Orasi Media Offshore Pvt Ltd., Mumbai

Nov 2022 – Jun 2024

Achievements:

- Helped open the first 20+ branches of an organisation using Operational Expenditure focused models that reduced initial Capital Expenditure by ~80%.
- Helped get new Sales employees up and running on Salesforce within a week of joining the organisation.
- Launched a customized software platform in time for the biggest Media trade show globally.
- Streamlined Quality Assurance and Delivery processes to improve the quality of testing, reduce defects and reduce production bugs.
- Have aligned with manufacturers and aggregators to provide clients with a complete set of Financial solutions

VP - Product Management & Operations

Dec 2020 - Aug 2021

Symbi, Mumbai

Role:

- Worked as a Consultant from Dec 2020 to Feb 2021 before joining full-time in Mar 2021.
- Built Mutual Fund and Investment Advisor organisations from ground up.
- Identified product features and application flows.
- Developed Digital assets, Assessed Technical integration, Aided UX design and managed prioritisation of features.
- Launched Investment Advisory website and built a prototype for Mutual Funds.
- Involved in drafting application and responding to subsequent queries for SEBI Mutual Fund license.
- Managed tie-ups with service partners such as Bankers, Custodians, KYC vendors and Payment Gateways.
- Selected partner basis product suite and costs.
- Projected costs to determine profitability.
- Determined organizational hiring needs in Product Management, Operations and Compliance teams.

Achievements:

- Launched the concept of Active Share, a first in India.

AVP - Business Initiatives

Jan 2005 - Nov 2020

Franklin Templeton Asset Management (I) Pvt Ltd, Mumbai

Role:

- Managed Projects aligned with business strategy/objectives to add revenue/value and minimise risk with focus on scope, cost, schedule and quality.
 - Projects included enhancements to Digital infrastructure and software used internally by most departments within the organisation, along with Process implementation/modification, new Product launches and Revenue increase via Retail Sales expansion & Digital partnerships.
- Interacted with core Management team for oversight on approach and deliverables via Steering committee meetings.
- Worked with Program Management Office (PMO) leaders to define pipeline as per business need, impact and budgets.
- Comprehensive management of project lifecycle.
- Identification and management of vendors.
- Assessment of software and suitable recommendations.
- Creation and management of Project Plans.
- Providing solutions in tandem with business and technical teams.
- Change Management and Training. Managing functional and project team members.
- Handled Digital partner onboarding.
- Working as part of a global team and interacting with all functions across Americas, Europe, and Asia.

Achievements:

- Increase of approx. 20,000 investors and INR 50 crores in assets in less than one year, by building automated processes with PayTM Money
- Launched Global Multi Manager Funds – First of its Kind in the Industry.
- Algebra Capital Integration – managed program for Portfolio Management, Trading and Operations teams, that resulted in lower Trading Costs and Software Cost Savings of USD 200,000 per year.
- Cash Management Software – Reduction in overdraft fees of USD 70,000 per year.
- Automated Fund Expense processing for Mutual Funds, using a customised software.
- Launched e-mandate and UPI on Digital assets along with other payment options to improve B2C transaction completion, improve user experience and reduce costs.
- Helped build and test models to increase retail penetration.
- Implemented and supported a newer version of Quantis, the Fixed Income Portfolio Management/Operations software.
- Implemented WealthSpectrum to automate the PMS business.
- Launched 6 branches in a shared office model.

Analyst

Aug 1998 - Nov 2001

Goldman Sachs & Co., New York

Role:

- Responsible as Business Analyst and Project Manager on technical and non-technical initiatives related to Equities.
- Managed all aspects of project lifecycle.
- Key Projects – Y2K for all US Equity Trading and Institutional Sales, Automated Confirmations software for OTC Equity Derivatives globally.

Achievements:

- Confirmations Tracking Software – Cost savings of ~ USD 1,000,000 per error through risk reduction.

OTHER ROLES

Consultant

Feb 2002 - Sep 2004

Maya Sanghavi MD, South Plainfield

Consultant

Oct 1997 - Jul 1998

BlackRock Incorporated, New York

Project Supervisor

Aug 1993 - May 1995

EDUCATION

Bachelor of Engineering (B.E.) - Chemical Engineering

May 2000

Stevens Institute of Technology, Hoboken, NJ, USA

SKILLS

Program Management, Project Management, Business Analysis, Product Management, Change Management, Risk Management, Agile & Waterfall methodologies, Communication, Managing Teams, MS Office, PMP, Budgets, General Management, Stakeholder Management, Vendor Management, Strategy Execution, Process Improvement, Reporting & MIS, PMO & Global Teams, Consulting, SDLC, SQL

LICENSES & CERTIFICATIONS

Project Management Professional

Valid until Apr 2027

Project Management Institute - 521676