

Michael Zupa

mzupa@me.com | 551-404-5867 | Franklin Lakes, NJ 07417

PROFESSIONAL EXPERIENCE

ZMC - Zupa Management Consulting, (January 2025 – Present)

CEO - Founder

- Provided strategic advisory services to clients, driving business transformation, process optimization, and operational efficiency across various industries.
- Advised senior leadership on corporate strategy, financial performance, and organizational design, delivering actionable insights to enhance growth and profitability.

Citi Group, New York, NY (January 2022 – June 2024)

Senior Vice President - Finance Transformation

- Drove operational excellence and continuous improvement across Finance on behalf of the Finance COO and CFO.
- Designed and implemented operating model enhancements to optimize efficiency and effectiveness.
- Developed objectives and key results (OKRs) to align Finance strategy with business goals.
- Supported senior leadership, including the COO, in developing tools, methodologies, and strategic project plans to continue to build and grow the firm's Finance Transformation Special Projects
- Created executive-level reports, dashboards, and presentations to communicate project progress to senior management and C-suite level stakeholders
- Led Program Management efforts to operationalize Topside Adjustments, EUCs, and Key Regulatory Reports, automating metrics to demonstrate risk reduction as committed by the CAO.
- Achieved significant reductions in Topside Adjustments (\$6T decrease) and total adjustments across reporting points (370k to 204k), with regulatory edit checks maintaining a ~99% pass rate.
- Drove global process and infrastructure standardization, leading the design phase of the Reporting Data Hub, Simplified Rules Authoring, Report Workbench, and ~90% of the Insight platform build.
- Managed a 20-member team to standardize Report Production Procedures, Process Flow Guidelines, and Report Workflow for Citigroup's BCBS 239 Key Reports.

Dixon Hughes Goodman, New York, NY (July 2018 – January 2022)

Program Manager - CFO & Business Advisory

- Established and expedited the monthly Regulatory Change Management Forum to streamline communication on reporting process and infrastructure changes.
- Launched the quarterly Risk and Finance Change Management Forum to inform senior stakeholders of significant changes impacting Risk and Finance.
- Led large-scale initiatives, including process re-engineering, regulatory remediation, business strategy implementation, and technology adoption.
- Led Steering Committee meetings, presenting LDTI implementation recommendations to the CFO and senior Finance and IT leadership.
- Established governance structures, defined roles and cadence, and developed project roadmaps and charters to enhance visibility, accountability, and control.

AIG, New York, NY (October 2014 – June 2018)

Program Manager - Manager Enterprise Finance Transformation (EFT)

- Led change management initiatives to implement new processes, improving underwriting, claims, and reporting through Lean/Six Sigma methodologies.
- Led the design and execution of the Future State Vision, Process Design, Target Operating Model, and Systems Landscape for ledger-based expense reporting.
- Established the Global SAP General Ledger as the 'Single Source of Truth' for USGAAP, local statutory reporting, and management reporting, standardizing global FX design and implementation.
- Collaborated with Corporate IT and business sponsors to select Finance Systems & Applications, decommissioning legacy systems and centralizing Finance System Support.
- Directed the rollout of SAP General Ledger across 80+ countries, integrating Ariba (Procurement), Concur (T&E), and SAP Fixed Assets & Accounts Payable to streamline global operations.
- Migrated multiple local GL systems and legacy applications to SAP, enabling large-scale finance transformation and system consolidation.
- Led risk and compliance initiatives for finance transformation projects, ensuring alignment with regulatory mandates and reducing compliance breaches by 25%.
- Conducted root cause analyses to address risk issues, delivering strategic recommendations for governance improvements.
- Executed Lean/Six Sigma-driven process optimizations, achieving \$15M in annual savings.

QBE, New York, NY (April 2012 – October 2014)

Tech Lead - Finance Transformation

- Held a multifaceted role within the Finance transformation program to ensure a smooth transition across multiple waves
- Enhanced efforts throughout Finance in identifying process improvement. This includes eliminating manual efforts, better utilization of current systems, new technologies, and better communication efforts throughout the organization.
- Supported the transformation leader while leading a team of four people in the restructuring and downsizing of the IT department by 65% for offshoring
- Oversaw the development and deployment of systems to support large-scale organizational transformations.
- Established standards for initiative scoping and delivery, improving team efficiency and project outcomes.
- Led enterprise-wide process improvement initiatives, enhancing efficiency and compliance.
- Developed comprehensive project plans for financial transformation and remediation projects.
- Worked closely with finance, risk, and technology teams to implement process automation solutions.
- Optimized communication and reporting frameworks, improving transparency and regulatory alignment.

E2E Advisors - New York, NY (January 2010 – March

2012) *Senior Consultant - Financial Business Operations*

- Consulted on strategic operations and client service enhancements, playing a pivotal role in the development of client-focused business strategies and operational improvements.
- Identified and created strategies to help support the growth of QBE business
- Consulted on SAP migration strategies, automating processes and reducing operational inefficiencies.
- Led process re-engineering efforts for accounting functions, enabling cost-saving measures.
- Participated in process re-engineering efforts for our specialty and middle-market accounting functions
- Worked as a Modeler / Architect to support the migration to SAP from PeopleSoft / Oracle legacy system

EDUCATION

Richard Stockton University (May 2008)

Bachelor of Business Administration and Management

CERTIFICATION

Certified ScrumMaster (CSM),

Core Competencies:

- Strategic Project Management: End-to-end delivery of strategic initiatives, including process reengineering and risk mitigation.
 - Operational Efficiency: Implementing process improvements to achieve measurable cost savings and productivity gains.
 - Stakeholder Engagement: Building strong relationships across teams to align project goals with business objectives.
 - Technology Integration: Advanced proficiency in Microsoft Project, Excel, PowerPoint, and emerging AI/ML tools.
 - Regulatory Compliance: Expertise in governance and risk management to ensure adherence to organizational standards.
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Technical Skills:

Financial Optimization, Process Optimization, Business Process Improvement, Change Management, Software Development Life Cycle (SDLC), Project Delivery, Business Analysis, Business Strategy, Stakeholder Engagement, Project Management, Agile Scrum and Kanban methodologies, GAAP, Financial Reporting, Process & Control Mapping/Documentation, Financial Systems Architecture, Process Learning and Re-engineering, Microsoft Office including Excel, Word, PowerPoint, Visio, Tableau, Power-BI, SAP S/4 HANA, SQL, Oracle, Workday, Access, and AI-driven products.