

TheWealth*Meta* – Detailed CV Knowledge Bank

Template

BankCo, Head of Strategy

2 Projects / Initiatives

01 Jan 2024 – Current



BankCo: Head, Strategy (01 Jan 2024 – Current)

Responsible for the development and execution of the bank’s corporate strategy

Project	Client / Employer	Nature of Project	My Involvement and Personal Achievements	Overall Project Outcomes
Corporate Strategy 2021	BankCo (Employer)	<ul style="list-style-type: none">Develop the 5-year corporate strategyObtain buy-in from key stakeholdersObtain Board approval	<ul style="list-style-type: none">Developed vision, mission and ambition targets by analyzing market position & trends, competitive advantages and competitive threatsFacilitated workshops with 10 senior management to identify 20 strategic initiativesSocialised strategy and incorporated feedback from 35 key stakeholdersDrafted and presented submission paper to Board of Directors for review and approval	<ul style="list-style-type: none">Obtained Board of Directors’ approval for 5-year strategy targeting EBITDA uplift of 2x within 5 years to RM 10 bn5-year strategy plan publicly launched in December 2022Improved analyst sentiment on BankCo future performance to 70% Buy calls (previously 40%)
Fintech partnership 2021 / 2022	BankCo (Employer)	<ul style="list-style-type: none">Establish partnership with a fintech to incorporate increase distribution of lending productsLaunch BNPL product via fintech partner within 2 years	<ul style="list-style-type: none">Performed market scan to identify list of potential fintech partnersFacilitated workshop discussion with Lending Division leaders to rank and shortlist top 3 potential fintech partnersDeveloped fintech partnership business case and partnership proposal materialEngaged top 3 to present proposal for fintech partnershipOversaw proof of concept as partnership lead and propositioned business case to Board of Directors to approve increased investments	<ul style="list-style-type: none">Executed partnership agreement with preferred fintech partnerLaunched pilot Proof of Concept with fintech partner within 3 months of establishing partnershipExceeded pilot targets by 150%, increasing business case attractiveness and increased funding support for scaled implementation totaling RM50m

ConsultingCo, Manager

[XX] Projects / Initiatives

01 Jan 2022 – 31 Dec 2023

ConsultingCo: Manager (01 Jan 2022 – 31 Dec 2023)

Engagement Manager responsible for leading strategy projects with Financial Services clients

Project	Client / Employer	Nature of Project	My Involvement and Personal Achievements	Overall Project Outcomes
Full potential strategy 2023	BankCo (client) A Leading Malaysian Bank ~5,000 HC >10M customers 300 branches RM 20bn revenue RM 5bn EBITDA	Full potential strategy deep dive , including identification of opportunities for new and adjacent business lines Team of 5 in working level team: 1 Manager, 2 consultants, 2 Analysts (12 weeks)	<p>Overall engagement management across stakeholders, coordinating key activities and communications</p> <p>Oversight of team across 2 workstreams:</p> <p><u>Workstream 1 – Strategy formulation</u></p> <ul style="list-style-type: none"> • Developed vision, mission and ambition targets by facilitating ideation workshops with Board and C-suite • Synthesised diagnostic results with insights from surveys and interviews to develop an emerging hypothesis on where to play and how to win • Formulated full potential strategy inclusive of business case for the creation of 2 new lines of business • Engaged C-suite for review and iteration of strategy prior to Board approval <p><u>Workstream 2 – Deep Dive diagnostic</u></p> <ul style="list-style-type: none"> • Launched survey to sample population of 2,000 respondents to understand consumer sentiment towards BankCo vs competitors • Performed due diligence diagnostic on existing business levers for potential EBITDA uplift • Interviews with select management stakeholders to seek clarification and validate lever(s) potential 	<ul style="list-style-type: none"> • Identified EBITDA uplift potential of RM 1bn – 2bn, ~30% uplift potential in 3 years from existing businesses • Developed strategic roadmap and obtained business case approval for BankCo to invest RM500m over 4 years into 2 new business lines, with a potential for 3.5x ROI over 8 years