

# JULIE HARBERT

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## CAREER SUMMARY

Results-oriented manager with 15+ years of experience managing teams of different sizes and with different experience levels and responsibilities.

Project manager with 4+ years in managing both the business aspects, as well as the high level technical tasks required for moving clients' data to a cloud environment. Within the management role, also managed many projects implementing new functionality and the onboarding of new clients within the financial industry

## WORK EXPERIENCE

### Project Manager

February 2017 – April 2021

SS&C Technologies, Kansas City, MO

#### Key Qualifications & Responsibilities

- Led multiple projects moving client environments to a cloud infrastructure
- Assisted team in developing documentation and procedures for completion of these projects
- Chosen to manage two high-profile projects

### Client Relations Supervisor

May 2013 – January 2017, April 2006 – October 2010

Boston Financial Data Services (BFDS), Kansas City, MO

#### Key Qualifications & Responsibilities

- Managed teams of up to 19 associates whose responsibilities included:
  - Managing projects related to output media, implementation of products, development solutions, conversions of new clients, mergers, etc in the highly demanding Mutual Fund industry
  - Daily support of client business (to include both internal and external clients)
- Initiated and contributed to process improvement efforts such as: checklists to be used when implementing new processes or changes to existing functionality, automation of monthly report generation, training of new associates
- Developed and managed client relationships to ensure customer satisfaction

### Client Relations Consultant

April 2006 – May 2013

Boston Financial Data Services (BFDS), Kansas City, MO

#### Key Qualifications & Responsibilities

- Developed and managed 4 client relationships from all perspectives of the mutual fund business; processing, phones, client services, corporate actions, other products used
- Lead conference calls and organized client visits
- Identified sensitive areas for the clients and developed solutions and trust with regard to BFDS' ability to provide a high level of service
- Collaborated with other groups to determine solutions to problems
- Identified areas where implementing changes eliminated extra steps in processing

- NAV purchases being exempt from CDSC fees
- Commfee updates to negate the need for manual updates to LOIs.
- Manage projects, including project documentation, conference calls, and implementation/overseeing of steps needed for project completion
- Assist in training of newer associates
- Contribute to the daily support as needed

## SKILLS

Leadership	Verbal and Written Communication Skills
Teamwork	Cross-functional team management
Staff development	Process Improvement
Project management	Conflict resolution
Microsoft Project	

## EDUCATION

B.S., Business Administration	Emporia State University
December 2008	