Caeson A. Potter

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Technical Skills

Jira and Atlassian Suite Tools, Confluence, Microsoft TSFS, Microsoft Teams, Microsoft VSTS, Caliber Agile Tool, Oracle, MongoDB, Amazon Web Services, Google Web Services Swagger API Service, Restful API, Microservices API, Kubernetes, Apigee, Microsoft Office Suite, Gantt Project Management, Adobe Office Suite, Scrum.org, CCPA Certified, Autonomy Interwoven Team Site, Live Site & Site Publisher, Media-Bin, Oracle ATG Endeca, Experience Manager, Web Accessibility Certified, HTML5, SharePoint, Complex Excel Macros, VBA, Pivot Tables, Salesforce, Orchestra CMS, Slack, HipChat, Teamwork and Basecamp Project Management Tools, IBM Blueworks, LucidChart and Draw.io Business Process Tools.

Professional Experience

**7-Eleven “7-NEXT” LLC Oct 2022 – Present**

**Position Title: Sr. Technical Product Manager – PAPI (Payments API)**

•Lead Technical Manager – Managed a group that consists of Back-End API Devs, Quality Assurance Analysts, Business Analyst and Scrum Master

•Product Management of the 7-Eleven Payment and Store Experience on the Point of Sales Device

•Owned, Reconciled and Triaged any Card Payment discrepancies at the Store experience working directly with the Production Support Team, Store Manager and Franchisee Owner

Managed and Prioritized all Scrum Activities for the Project Roadmap for Features as well as all Defects for Credit Card Production Support

•Led all Partner and Payment Integration efforts such as the completed 7-Eleven/P66 Acquisition as well as the current 7-Eleven/ExxonMobil Merger

•Managed all Payment Processor Certifications based on Store Type – Worldpay Processor, Heartland Payment Systems, Fiserv and Canada Global Payments

•Reconciled all downstream Card Payment Processing issues thru various Platforms – POS, Cash, Accounting, Reconciliation and Reporting consistently maintaining PCI Compliance Requirements

**Yum Connect LLC (Pizza Hut) Feb 2018 – Aug 2022**

**Position Title: Sr. Technical Product Owner**

•Lead Product Owner Managing a group that consists of React Native Devs, Go Lang Developers, Business Analyst & Quality Assurance Analysts

•Product Management of the Pizza Hut.com Website and Point of Sale System services for our Franchisees

•Owned and prioritized the Project and Scrum Backlog of requirements from the end customer and from all impacted Dependent Teams – Marketing, Payment, Accounting.

Managed and Prioritized the Project Roadmap for Features – In Scope, In Backlog for Future Enhancement

•Led all Sprint related activities including Sprint Grooming Sessions, Sprint Priority Planning, Sprint Sizing, Story Pointing, Sprint Backlog & Burndown of Hours using Jira Agile Tool during the Sprint.

Managed the Prioritized Feature Releases with the dedicated

•Key Contact in Project Communication to all Business Stakeholders & C Level Executive Staff

Professional Experience

**Client: Frontier Communications Aug 2017 – Dec 2017**

**Position Title: Technical Agile Business Systems Analyst**

•Lead Technical Agile Business Analyst gathering requirements and grooming User Stories for the Automated Programming Tool, DropShip API and Inventory Management Database Projects.

•Successfully used Agile/Scrum Methodology for gathering requirements and facilitating User Story refinement meetings with Product Owners and Agile Team Members.

•Led and Managed a team of Developers on the APT, Dropship API and Inventory Management Database Projects, working directly with Key Business Leads.

•Led all Sprint related activities including Grooming Sessions, Sprint Priority Planning, Sprint Sizing and Burndown of Hours using TFS Agile Tool during the Sprint.

•Documented User Stories and facilitated Story Point discussions to analyze the level of effort during Sprints

•Managed and led a team of Java developers and Quality Assurance analysts

**Client: Nationstar Mortgage May 2016 – July 2017**

**Position Title: Agile Business Systems Analyst**

•Lead Business Analyst in the successful migration of Source for Records system for Nationstar Mortgage moving from CELINK to CHIP.

•Successfully used Agile/Scrum Methodology for gathering requirements and facilitating User Story refinement meetings with Product Owners and Agile Team Members.

•Led and Managed an Offshore Agile development team consisting of Developers and Quality Assurance Members

•Led all Sprint and Scrum related activities including Grooming Sessions, Sprint Priority Planning, Sprint Sizing and Burndown of Hours to determine velocity during the Sprint.

•Documented User Stories and facilitated Story Point discussions to analyze the level of effort during Sprints

•Created and maintained data mapping documents working directly with the ETL Team and SunWest Mortgage Company.

•Functioned as the Primary liaison between Senior Business Leaders, Line of Business, Development and QA Leads**.**

•Managed and led a team of Java developers and Quality Assurance analysts

**Client: Interstate Batteries Jan 2016 - April 2016**

**Position Title: Business Intelligence Analyst**

• Existing data from various sources were data mined and consolidated into a uniform SQL server database, ETL capabilities of SQL Server Integration Services were used to define data imports

• Gathered Key Business Requirements and Key Performance Indicators to drive Internal and External Reporting using MicroStrategy Adhoc Reporting

• Managed all User Stories and the Kanban Board using Microsoft Team Foundation Server

• Worked directly with Product Team vendor to understand and implement all Key Business Requirements during the SpeedyCo Implementation Project

• Analyzed and remedied all requirement gaps with Key Business Stakeholders during key Joint Application discussions.

**Client: FedEx Office May 2015 - Jan 2016**

**Position Title: Senior E-commerce Business Analyst – Print Online**

• Facilitated Joint Application Design (JAD) sessions and workshops with the Business Leads to identify all requirements for the FedEx Print Online Redesign.

• Collaborated closely with SMEs to identify and analyze core requirements and key features of the Promotions, Pricing and Site-Catalyst business and design requirements for the Print Online Redesign.

• Created and managed Functional design requirement document (BRS) for implementing all Promotions, Pricing and Site-Catalyst business and design requirements for the Next Gen 2.0 Release.

• Collaborated with the RDA Release Team and Business Stakeholders to convert all Business Requirements into Agile Epics, Features and User Stories within the Caliber Agile Requirements Tool.

• Analyzed and remedied all requirement gaps with key business leads and all UX/UI design gaps with the Visual Vendor (Tank Design).

• Organized, planned and scrubbed bi-weekly defect list for my defined Product Features to eliminate any requirement or design gaps as well as capture future enhancements.

**Client: AT&T Partner Exchange July 2014 – April 2015**

**Position Title: Senior E-Commerce Business Analyst – Partner Exchange**

• Senior Product Analyst working directly with the Product Owner on the Agile Business Requirements for the Content Management System during the Partner Portal Exchange Redesign.

• Elicited and documented requirements for the Web Content Management System designed to increase efficiency for business users decreasing content publishing times from daily to minutes

• Managed and Led all internal discussions with Business Leads and Vendors regarding a desired Salesforce based Content Management Solution.

• Wrote the Epics and all related Agile User Stories in Rally Agile Tool for the Content Management System during the Portal Exchange Web Redesign.

• Created all requirements specifications, Use Cases, High Level and Granular Detailed Process Flows for the Content Management System for the Partner Portal Exchange Redesign.

• Worked with the Content Team, UX/UI Team Design Team, Business Leads and Development Teams on design Templates and Requirements for the Content Management System.

**Client: AT&T Digital Strategy Feb 2014 – July 2014**

**Position Title: Project Manager – Content Management Integration**

• Lead Technical Project manager on the Oracle Endeca, HP Live site & Team site Integration for the R3 Website Redesign for the AT&T Small Business Content Management Team.

• Managed and created all Project Related Activities for AT&T Small Business Content Management Team including the Project Plan, Issues Log, IT Code Delivery Schedule Plan and the Release Plan.

• Chaired all Meetings, built and maintained strong relationships with Business Leads, PMO, Project Managers, Lead Developers, IT, QA and all other delivery teams to ensure cross functional compatibility among systems.

• Worked with the Product Owners, Vendor UX/UI Team, SEO Team and Business Leads to help lead and direct on best practices for Content Management implementation based on project requirements.

• Created Proof of Concepts for Media-bin and Idol Search for Senior Business Leads to determine the viability of using both systems as part of the Website Redesign

• Ability to advise on technical project requirements and manage multiple projects at once, ability to operate both independently or as a core member of a larger cross functional team.

**Client: Citi Partner Retails Cards Feb 2012 – Feb 2014**

**Position Title: Senior Content Management Analyst**

• Lead manager on acquisition partners content development and implementation using the autonomy Teamsite platform.

• Lead CMS project manager working with the IT PM Lead, business Architect, Business Analyst, Lead Developers, Web Producer, Visual Vendor, Offshore resource team and Quality Assurance leads to ensure proper project timeline and defect management.

• Creation, editing and management of all partner specific content, including all visual elements provided by the vendor via a Copy Deck produced and managed by the Sr. Web Producer.

• Completed of the Mobile Application content development for Tier 1 Citi partners Best Buy Home Depot in both English & Spanish using the latest Citi approved CMS system via Autonomy Teamsite.

• Tracked and Logged all software development bugs using HP Quality Center and produced Trouble Reports, change tickets and post production support work via the production support team.

**Client: Franklin Templeton Investments Oct 2011 -Feb 2012**

**Position Title: Senior Autonomy Interwoven Business Analyst**

• Lead Analyst migrating Content from the Client’s Content Portal to the Autonomy Teamsite Content Management System.

• Utilized the Business Requirement Document to produce Change Requests and communicate with development team on future enhancements in the Autonomy Teamsite 7.2 environment.

• Creating, Editing, Updating and Publishing of Content using the Teamsite 7.2 environment, viewing and tracking of updates on the Livesite runtime environment.

• Sitemap Creator and Manager of International Country Communications as they migrated content from Source Portal to Autonomy Teamsite.

• Taxonomy Changes in Teamsite, as well as testing of new Pages and Components.

• Tracked and logged all Software Development bugs using HP Quality Center and produced Change Requests accordingly.

**Client: Morgan Stanley Global Private Wealth Mgmt Jan 2010 –Sept 2011**

**Position Title: Senior Autonomy Interwoven Business Analyst**

* Web Content Migration project moving from the Client’s proprietary CMS system to Autonomy Teamsite
* Client Facing role assisting the Business Authors in understanding the Autonomy Interwoven Platform using Test Cases and User Acceptance Training.
* Lead CMS Migration Analyst defining usable Data Capture Templates and Data Capture Records in which Business Content could reside within the future state.
* Creation of Taxonomy taxons and Metadata logic for Content Type searching
* Retrieval of external components using Java and XML.

**Client: MF Global**

**Position Title: Fixed Income Reference Data Analyst**

* Responsible for Derivative & Fixed Income Reference Data project mapping Reference Data from the Clients Proprietary platform unto a New Centralized Data Repository
* Responsible for Client Account Reference Data integration across the clients entire Client Base.(This includes Institutional Clients, Retail Brokers, Correspondent Clearing, Non Brokerage and Client Internal House and Suspense Accounts)
* Research, Analyze and Compose Technical Documents, Business Requirement and Functional Specification Documents as they pertain to changing initiatives in OTC Derivatives as well as existing Business Practices.

**Bank of America/Merrill Lynch Apr 2008 – Dec 2009**

**Position Title: Senior Derivative Settlements Consultant**

* Daily Confirmation & Analysis reconciliation of all Pre & Post settled Credit Derivative Trade Agreements
* Daily Reconciliation of CDS, IRS, Swaption and OTC Derivative Break Report
* New Client Account SSI (Standard Settlement Instructions) and Wiring Instructions with Global Buy-Side Institutional Client Base for all CDS & IRS Products
* Worked directly with the new Client Account team on validation of KYC(Know Your Customer) and proper due diligence on Global Buy-Side Clients I-O for the firms Client Identification Program
* Daily Reconciliation of DDA Cash Swap Account related to Buy Side Clients I-O
* Direct Liaison for all OTC Credit Default Swap Trade Agreements on Buy Side Clients I-O.
* During Phase I of the Reconciliation Project, responsible for clearing all Archived Cash Breaks on Buy Side Clients I-O before Year End Books were turned over to Senior Compliance & Regulatory Group
* Worked with Senior Vice President to install Archived Cash Breaks Metrics that does not allow Cash to age past Ten Business Day without the notification of Senior Management

**Credit Suisse International Sept 2007 – Apr 2008**

**Position Title: Senior Structured Derivatives Consultant**

* Daily Reconciliation & Review of all Derivative Products traded within Fixed Income Derivative Product Control.
* Maintenance & Analysis of products which included: Rate Caps & Floors, Rate Corridors, IRS,Basis Swaps, Swaptions, Spreadlocks & Euro One Touch Spreadlocks with Swaption Features.
* Direct liaison with Trading Desk, Sales Team & Middle Office to resolve all Derivative Control discrepancies between ISDA documentation and Traders Excel driven macro sheets.
* Daily analysis & update of Trading Brokers Complex Excel Driven Macro P&L Sheets.
* Daily Reporting of Traders Excel Macro Sheets to ensure correct Profit and Loss Accounting based on Mark to Market Accounting Methodology

**International Fund Services Jun 2007 – Sept 2007**

**Position Title: Senior Global Maintenance Consultant**

* Daily reconciliation of all product types (equities, fixed income, derivatives) on global maintenance using Bloomberg, Reuters and complex excel macros.
* Research, analysis, updates and implementation of all clients held product types using SQL scripts and formulas.
* Super-user functionalities - give users on global maintenance access to fund and client reporting, opening and closing state street audit required test tracks.
* Direct liaison with vendors (Bloomberg, Reuters, IDC) on any pending global maintenance security related discrepancies.

**HSBC Alternative Fund Services Mar 2005 – Jun 2007**

**Position Title: Sr. Derivative Fund Analyst**

* Daily Valuation of Derivative instruments using Geneva, DTCC & Fastval Valuation Accounting for the MAN PLC Fund (a hedge fund consisting of Interest Rate Swaps, Total Return Swaps, Overnight Index Swaps, Basis Swaps, FX Currency Swaps, Credit Default Swaps and Swaptions based on Interest Rate Swaps

Trained and lead all staff on the utilization of Geneva from a valuation perspective on all derivative based instruments including DTCC, term sheet documentation and broker provided spreadsheets and documents.

* Input and priced all derivative, commodity, foreign exchange, equity and debt based assets on global portfolio using DTCC confirms, Bloomberg, Reuters, FT Interactive Data and Solar Reporting System.
* Processed and updated all Bloomberg and Reuters based price/FX reports on Solar Reporting Feed program

**The Bank of New York July 2002 – Mar 2005**

**Position Title: Sr. Operations Analyst**

* Provided Trade Support for middle office to ensure adequate settlement of trades
* Researched Market Data & Relevant Trade data support to Global Custody Team using Bloomberg & Reuters
* Maintained effective lines of trade communication with Portfolio Managers, Corp Actions, Custodians, Global Accounting, Technology, and Trade & Middle Office Support.
* Data support in regards to asset set-up, resolution of client discrepancies, vendor feed support and testing for software automation projects
* Corporate actions, reconciliation, interest accrual and interest maintenance of all relatable securities using Bloomberg, Reuters and Interactive Data

**UBS Private Asset Mgmt. Nov 2001 – July 2002**

**Position Title: Sr. Operational Analyst**

* Researched, analyzed and processed all security related trades on Global Plus using Oasys OMS Landmark and Portia Portfolio Management System
* Troubleshoot all Global and Domestic security set up and trade processing errors on Global Plus
* Month end analysis of all Global and Domestic Security Masterfile maintenance and pricing maintenance using Bloomberg, Telekurs, Extel and Euroclear as primary vendor sources

**JPMorgan Chase June 2000 – Nov 2001**

**Position Title: Repo Trading Processing Supervisor**

* Developed Security Masterfile for Global Plus during Phase I and II conversions.
* Rewrote, analyzed & updated test cases for the front to back end usage of Security Masterfile on Global Plus.
* Trained New York & Dallas personnel on Security Masterfile and Trade Processing during Global Plus conversion.
* Wrote all front-end Security Masterfile procedures & Static Data for Global Plus.
* Spearheaded the entire Security Masterfile transition project from Titan System into Global Plus during phase II conversions.
* As a Trade Processing Supervisor, inputted and reconciled GICS, SLGS, Commercial Paper and Repurchase Agreements on Global Plus reporting directly to the Assistant and Vice President
* Inputted & Reconciled Repurchase agreements with Counterparty Brokers using collateral linked trades on Global Plus.
* Reconciliation of GIC & SLG assigned DDA accounts by properly assigning principal and interest amounts.

**Brown Brothers Harriman Feb 1997 – June 2000**

**Position Title: Security Masterfile Analyst**

* Researched, Analyzed & Processed all security related trades on Brown Brothers Internal Bids System
* Troubleshoot all Domestic and Global Equity, Fixed Income and Derivatives Set up discrepancies for Internal Private Wealth, Institutional and Custody Clients
* Month end analysis of all Security Masterfile trades on Traders Books using Bloomberg, IDC & Reuters as primary vendor sources. Troubleshoot all domestic Equity, Fixed Income and Derivatives Set up discrepancies for Internal Private Wealth clients.
* Month end analysis of all Security Masterfile trades on Traders Books using Bloomberg, IDC & Reuters as primary vendor sources.

**EDUCATION & CERTIFICATIONS**

Associates Degree - Occupational Studies, June 1993

Interactive Data Derivatives Course Completion, September 2003

Bloomberg PC Certified, June 2007

Scrum.org Certified Product Analyst September 2018

CCPA Certified July 2020

PCI Compliance Training 2025