**KARLA LLANOS, MBA, PMP**

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**PRODUCT OWNER | PROJECT MANAGER | SCRUM MASTER**

Solution-oriented Product Owner and Project Manager with over 10 years of experience in the financial services and insurance sectors. Proven success leading high-impact, cross-functional programs in Agile and Waterfall environments, delivering cloud-based modernization, system migrations, and regulatory compliance projects. Adept at backlog grooming, sprint planning, stakeholder alignment, risk management, and performance tracking from concept through implementation.

**Core Competencies:**

Project Management • System Integration • Business Analysis • Business Requirements • Workflow Diagrams

 Stakeholder Engagement • Risk Management • Resource Management • Cross-functional Teams • Quality Assurance Conflict Resolution • SDCL• User Stories • Regulatory Compliance • Performance Metrics • Data Analysis • Vendor Management • Data Analysis • Jira • Servant Leadership • Stand up meetings • Change Management

**Demonstrated Value:**

* **IT, Operational Project Execution & System Implementations –** Led enterprise-wide financial and insurance technology solutions, ensuring seamless integration and process optimization.
* **Agile & Waterfall Expertise –** Managed full program execution lifecycle, mitigating risks and driving digital transformation as an operations and project manager.
* **Risk Management & Change Leadership –** Proactively identified risks, implemented mitigation strategies, and led change management initiatives aligned with the project scope and risk assessments to ensure compliance and operational efficiency.
* **Strategic Communication & Governance –** Served as the primary liaison for C-suite executives and cross-functional teams, driving business alignment by gathering stakeholder requirements, presenting key deliverables, and ensuring transparency throughout the project lifecycle.

**PROFESSIONAL EXPERIENCE**

**TATA CONSULTING SERVICES, Aventura, FL (Remote) 2020 – Feb 2025**

**Operations Manager | Project Manager**

Led operations and project management initiatives for a Fortune 500 financial institution, ensuring financial processing accuracy, regulatory compliance, and workflow optimization.

• Manage cross-functional teams across IT, finance, and operations to execute strategic projects that enhance organizational performance, strategic operations, and project delivery.

• Directed Agile-driven remediation project resolving 20,000+ annuity policy discrepancies, achieving successful SLA compliance and mitigating monthly penalties, finishing the project on time and within scope.

• Facilitated daily standup meetings, circulated detailed status reports, and captured action items, managing transparent communication across stakeholder groups, including a team of 17 direct reports.

• Spearheaded SharePoint and Jira implementations, optimizing financial reporting workflows and regulatory compliance tracking after documenting necessary business requirements and workflow diagrams.

• Deployed an internal chatbot solution to automate inquiry resolution and reduce manual lookup effort by overseeing the entire software development cycle, SDLC.

• Established contingency workflows to mitigate risk caused by system outages and developed a change control plan.

**COVET K, Aventura, FL (Remote) 2019 – 2020**

**Owner | Consultant**

Provide strategic financial, project management, and Agile coaching to startups and mid-market firms, driving system implementations, process automation, and end-to-end business transformation.

• Partnered with the business owners and team members to elicit requirements, mapped current-state workflows in Visio, and designed compliance frameworks to ensure accuracy, timeliness, and compliance with accounting standards.

• Monitored procurement by analyzing vendor service level agreements (SLAs) and contract compliance.

• Coordinated change management efforts through Agile methodology to achieve rapid adoption of new digital tools and maintain continuous improvement.

• Facilitated Lean Six Sigma–continuous improvement initiatives that reduced manual effort by 40% and accelerated time-to-value for key project milestones.

**Karla Llanos, MBA, PMP Page 2**

**CK HOLDING GROUP, North Miami Beach, FL 2015 – 2019**

**Financial Project Coordinator**

Led financial planning, compliance oversight, and project coordination for commercial real estate activities.

• Coordinated SOW documentation and liaised with bank credit committees—drafting and presenting funding requests, addressing inquiries, and ensuring 100% on-time credit approvals.

• Drove $ 12 M+ revenue growth strategies by facilitating bank negotiations for commercial real estate acquisitions, dispositions, and refinancing projects.

• Oversaw subsidiary and GL reconciliations, ensuring audit-friendly documentation and implementing root-cause analyses to eliminate recurring errors.

**BANK OF AMERICA, Aventura, FL 2013 – 2015**

**Relationship Manager**

Developed new business opportunities, managed high-value client portfolios, and ensured regulatory compliance in financial transactions.

• Oversaw end-to-end client lifecycle management—onboarding, investment strategy, and periodic reviews—ensuring 100% compliance with FINRA, AML, and KYC requirements.

• Managed financial and wealth portfolios, optimizing risk management and client investment strategies.

• Developed and executed targeted outreach strategies that grew a $ 5 M+ high-net-worth portfolio over two years through data-driven segmentation and cross-sell analytics.

**JP MORGAN CHASE BANK, Long Grove, IL 2006 – 2013**

**Business Specialist | FINRA Representative**

Provided strategic financial guidance, investment management, and compliance oversight. Assisted clients in managing investment portfolios, credit applications, and banking regulatory adherence.

• Led the “Chase at Work” community outreach program, partnering with local employers to market banking services and facilitate on-site account openings—driving 1,200+ new accounts annually.

• Developed and executed proactive outreach campaigns, acquiring 100+ new individual clients per month through targeted market analysis and relationship-building.

**EDUCATION**

**MBA in International Business,** Keller School of Management, Chicago, IL

**BS in Technical Management,** DeVry University, Chicago, IL

**Industrial Engineering Coursework**, Universidad Nacional de San Agustin, Arequipa, Perú

**CERTIFICATIONS & TRAINING**

**Certifications:** Project Management Professional (PMP) - PMI, Professional Scrum Master (PSM I) - Scrum.Org, Lean Six Sigma (CSSC), Project Management: Leading Organizations to Success - (MIT), Series 6 (FINRA), Financial Coach (Ramsey Solutions), SDCL (Udemy), Generative AI for Project Managers (PMI).

**ADDITIONAL INFORMATION**

**Technical Skills:** Microsoft Office Suite, Microsoft Project, Visio, JIRA, Tableau, SAP, ServiceNow, ERP, CRMs, Salesforce, HIPAA, SOX, Insurance Data Governance, Avaya, Teams, Slack.

**Languages:** Fluent in Spanish.

**Professional Affiliations**: PMI Member, Project Management Volunteer & LinkedIn Contributor.