

Thomas Frank

Profile



Contact

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Personal Record

Education:	Diplom Kaufmann
Year of Birth:	1969
IT – Experience since:	1990
Nationality:	German
Languages:	German, English

Knowledge and Skills

Focus:	<ul style="list-style-type: none">• Business Intelligence, Management Information Systems, Corporate Performance Management• Cognos Business Intelligence Softwaresuite, OLAP, Reporting, Analyse, Scorecarding• Data Warehousing, ETL (Extract Transform Load)• Project Management,																		
Operating Systems	Windows, UNIX																		
Data Bases:	Oracle, DB2, MS SQL, Teradata, MySQL																		
Products / Standards / Experiences:	<table><tr><td>COGNOS 11</td><td>5 J.</td></tr><tr><td>COGNOS 10</td><td>8 J.</td></tr><tr><td>COGNOS 8 BI (Report Studio, Query Studio, Analysis Studio, Metrics Studio, Event Studio, Administration)</td><td>7 J.</td></tr><tr><td>COGNOS ReportNet (Report Studio, Query Studio, Administration)</td><td>3 J.</td></tr><tr><td>COGNOS PowerPlay</td><td>10 J.</td></tr><tr><td>Qlik Sense</td><td>2 J.</td></tr><tr><td>MS SQL Server Integration Services (SSIS)</td><td>10 J.</td></tr><tr><td>MS Office</td><td>10 J.</td></tr><tr><td>Projektmanagement CompTIA, PMI</td><td>4 J.</td></tr></table>	COGNOS 11	5 J.	COGNOS 10	8 J.	COGNOS 8 BI (Report Studio, Query Studio, Analysis Studio, Metrics Studio, Event Studio, Administration)	7 J.	COGNOS ReportNet (Report Studio, Query Studio, Administration)	3 J.	COGNOS PowerPlay	10 J.	Qlik Sense	2 J.	MS SQL Server Integration Services (SSIS)	10 J.	MS Office	10 J.	Projektmanagement CompTIA, PMI	4 J.
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History of Projects - 1/11

	IAZI AG Zürich 10/2020 – heute
Description:	<p>Responsibility for the SaaS Business Intelligence product portfolio, Key Account Management and for improvements and structuring in Data Management.</p> <p>The Business Intelligence product portfolio includes the applications</p> <ul style="list-style-type: none">• ImmoCockpit: Analysis of large real estate portfolios according to financial and typical real estate key figures for real estate management, insurance companies or pension funds• HypoCockpit: Analysis and risk control of large mortgage portfolios according to financial and real estate-specific key figures and risk measures for banks and insurance companies• Polit-Monitor: Display of political advances in Switzerland on real estate-related topics at the federal policy level and for selected cantons and cities• Internal reporting: evaluations in several dashboards for control and monitoring of license models, use of applications and quality of statistical models, etc. <p>Development of specific product requirements in direct customer contact or as an internal service provider and transformation of these into well described and feasible implementation tasks. Structuring of tasks into releases and development of a product road map. Steering and management of the implementation and deployment with indirect technical team management of an offshore development team with 5-10 developers in Goa, India.</p> <p>Consolidation of the different development branches, monitoring of operations and licensing, training, pre and post sales, strategic development.</p> <p>Key Account Management for three key customers in the area of Portfolio Management Software and support for other key accounts.</p> <p>Analysis and research of problems in the area of data management and data flow, initiative for standardization and workload automation.</p>
Testimonials	<p>"Through the development and introduction of IAZI ImmoCockpit GMOS and the reactivation of IAZI REPM, we were able to further professionalize the portfolio management of Gen. Migros Ostschweiz. In Mr. Frank, we had a very competent, solution-oriented and far-sighted partner at our side for the conception, further development and operational management."</p> <p>Glauco Degan, Project Manager Portfolio Management/Location Development, Genossenschaft Migros Ostschweiz, Gossau</p> <p>"Mr. Frank provided us with excellent support during the introduction of the IAZI products. With his goal-oriented and calm manner, he successfully accompanied us during the first steps in the tool and completed the introduction of the IAZI tool with us on schedule. After the introduction, Mr. Frank continued to support us as a key account manager with his great expertise and cooperative manner. The cooperation was always very good and even in hectic times the interpersonal was not neglected."</p> <p>Pascal Staub, Leiter Portfolio Management, Mitglied der GL, Wonneberg AG, Winterthur</p>
Realized with:	Windows, QlikSense, MS SQL Server

History of Projects - 2/11

Bank Vontobel AG Zürich

07/2010 – 06/2020

Description:

Realization of a Management Information System at Bank Vontobel AG. In order to improve the operational steering at Investment Bank of Bank Vontobel this MIS should hold an integrated overview of the corporate key performance indicators and offer full flexibility to analyze these KPIs regarding different business categories and dimensions.

The main goal was to picture customer profitability in terms of direct revenue and related direct costs without consideration of allocations or imputed deductions.

The then current control by data of Financial Accounting at cost center level wasn't granular and detailed enough.

- Initial recording of requirements, understanding the system landscape of Bank Vontobel and the present entities, Business Analysis and Data Discovery
- Building a data mart with data from the transactional and master data system on single transaction- and individual account basis.
 - Setting up a load logic based on indicators of the booking engine on a daily basis.
 - Establishment of a multidimensional universe of customers, employees, securities and other dimensions with bi-temporal full flex history
 - Unique embedding the key figures in the created universe.
- Full automation of the data loads via ETL, scheduling and integration in the banks daily processing, providing the analysis data in the reporting level morning day-finished.
- Embedding of transactions and master data not included in the main transaction and master data system of Bank Vontobel from branches abroad. Implementation of a web application for data entry and maintenance with bidirectional data transfer and matching.
- Construction of a first reporting level in pre-aggregated granularity and a second reporting level on individual trade basis for two business areas of Investment Banking.
- Enhancements to the data mart in several steps.
 - Extension of the transactional reporting level to non-additive KPIs such as customer assets.
 - Extension of the web application for data input of budget figures, which are only available in a deviating granularity of the reporting level. Integration of the budget figures into the reporting universe.
 - Expansion of the reporting level to methods of forecasting. Implementation of various Algorithms for dynamic creation of daily forecasts on transactional and asset KPIs.
 - Integration of retro key figures from EAM business and internal service charges of transactional costs in differing periodicities.
 - Connection and integration of a special system for production and trading of structured products with an own transaction and main data management.

History of Projects - 3/11

Bank Vontobel AG Zürich

07/2010 – 06/2020

Projektbeschreibung:

- Connection and integration of a special system for production and trading of structured products with an own transaction and main data management.
- Connection of a CRM system with bidirectional data exchange.
- Development of a method for fully automated customer segmentation based on actual and expected returns.
- Implementation of 85 interfaces to 5 different systems with different load cycles and different granularity. Fully automated 3-times-daily data loads from different source systems. Automatic data quality checks and data verification.
- Installation of the reporting tool Cognos BI and creation of a reporting application (example :)
 - Relational reporting application for power users in both pre-reporting levels (pre-aggregated and single transactional)
 - Multidimensional data cubes for analysis of highly aggregated KPIs.
 - Standard reporting with mail distribution to 100+ recipients with general and personalized reports.
 - External reporting with market data.
 - Internal sales support by distributing security and customer information to sales advisors.
 - Daily management reporting aggregated on the organizational structure from department level to the individual employee.
 - Reporting for MBO.
 - Interactive and integrated reporting application with Drill Down / Up / Through the analysis of the transactional business.
 - Highly aggregated daily dashboards with customer and transaction clustering.
- Project activities
 - Project Manager: Scrum, sprint planning, project communication.
 - Requirements Engineer: Querying stakeholders and first point of contact for requests or change requests.
 - Business Analyst: Analysis of the business problem, data discovery in pre- and pre-pre-systems, analysis of data sourcing, feasibility and effort estimations.
 - System Architect: System Design, Safety Concept, coordination with IT departments, license procurement.
 - Developer: Solution implementation of a business oriented technical solution.
 - Support: Delivery of all support roles in business related and technical problems.
 - Operation: Ensuring daily loads, error handling during operation, updates and migrations.

Later development of a management information system at the Private Banking at Bank Vontobel AG by cloning the Investment Banking MIS. Project not completed.

History of Projects - 4/11

Bank Vontobel AG Zürich

07/2010 – 06/2020

Testimonials

"For the Advisory & Distribution department within Financial Products, the application IB MIS implemented by Mr. Frank has led to a strong improvement in the transparency of the daily business. The initial skepticism about whether the new MIS could answer our questions could be rapidly degraded. An especially for FP Advisory & Distribution developed reporting frontend is used daily and intensively. Mr. Frank was always open and interested in our concerns, his solutions were valuable and useful for us."
Georg von Wattenwyl, Head Financial Products, Advisory & Distribution, IB, Bank Vontobel AG, Zürich

"The Brokerage Business at Investment Bank at Bank Vontobel uses by Mr. Frank the implemented IB MIS with utter satisfaction. In addition to the profit center commitment from accounting it is a very good supplement to control daily operations. From an aggregate perspective on teams, top customer reports, analysis of single trades, trade details for selected securities, staff reports up to overviews of customer segmentation, the system reliably delivers transparency to sales and research. For any technical question going beyond the standard reports, Mr. Frank was always approachable and solution-oriented"
Peter Romanzina, Head Brokerage, IB, Bank Vontobel AG, Zürich

"The MIS application at investment bank of Bank Vontobel AG developed by Mr. Frank is a great support for my work. In addition to the financial and operational accounting it can be used to analyze and assess the strategically important financial indicators of the daily business on level market / product / sales channel / employee. The increasing transparency, which was accompanied by the development of the system, can be lead back on Mr. Franks knowledge and his great interest in the issues of controlling. The quickly by Mr. Frank developed adequate solutions were characterized through reliability, a strong service and customer orientation and a high degree of automation. By that he could contribute significantly to the success and variance analysis of the course of business."
Daniela Werner, Head Controlling IB, FR, Bank Vontobel AG, Zürich

"Over the last 5 years, Mr. Frank was commissioned in the Business Management Team at Investment Bank of Bank Vontobel AG, to implement a management information system. In retrospect it is clear that Thomas Frank was a substantial success factor for the project and the operation of the MIS by his proactive and speedy operation, as well as his high quality standards. The collaboration with Mr. Frank was always very professional and competent, he understands his business. 5 years in Business Management Team do speak in favour for Mr. Frank."
Christof Naef, Head Business & Distribution Management, IB, Bank Vontobel AG, Zürich

History of Projects - 5/11

Bank Vontobel AG Zürich

07/2010 – 06/2020

"In 2014 Private Banking at Bank Vontobel AG planned to build its own MIS independently of financial accounting. The demonstration of the IB MIS impressed Private Banking management, so it was decided to implement it as a clone of the IB MIS. The Private Banking was able to win Mr. Frank with his expertise to carry out the implementation. Due to its excellent technical knowledge, the project rapidly gained momentum in content and form. The priorities of private banking, however, have shifted, so that this project has been postponed for the time being."
Christian Hauser, Head Business Development & Business Management, PB, Bank Vontobel AG, Zürich

"During 5 years at Bank Vontobel AG Mr. Thomas Frank has realized the central MIS to sales management in the Investment Banking business unit. He was responsible for the analysis of requirements, the solution design and the implementation. With his professional, forward-looking and flexible working methods he contributed significantly to the success of the new management information system. Mr. Thomas Frank has very high skills in technical and banking-related matters and is able to apply them successfully and purposefully."
Hanspeter Purtschert, Head Integration Services, OP, Bank Vontobel AG, Zürich

Realized with:

Windows, MS SQL 2005-2012, MS SQL Server Integration Services (SSIS), Reporting Services (SSRS), Cognos 10, UC4

History of Projects - 6/11

UBS Zürich

10/2007 – 06/2010

Description:

Involved into various projects within the Cognos Competence Center of UBS.

- Supervision of projects in Risk Control, Sales Controlling, Cost Center Reporting, Marketing and Frontdesk Applications.
- At this Gathering of Requirements, Design, Implementation, Roll Out, Customer Care and Support.
- Ongoing development of existing applications, migration from IWR to Cognos 8, modification of the environments.
- Supervision and execution of the requirements from Data Warehouse/ETL Layer up to the Reporting and Analysis Frontend, Push Mails and Alerting.

Exemplary:

Cognos Competence Center

Central point of contact for reporting requirements which should be realized with Cognos as the strategic BI platform within the UBS

- Support of the business departments with any questions regarding technical Limitations and Options.
- Integration and ongoing optimization of the interaction between the Cognos Software with the existing applications in the UBS systems network according to UBS policies and legal terms and conditions.
- 3rd level support and Cognos Customer Support contact
- Maintenance and improvement of the Cognos infrastructure within UBS on an ongoing basis.

"During the almost three years of his engagement at UBS Cognos Development Mr. Frank gave valuable support in the most different projects in multiple areas of UBS. His extensive knowledge in the Cognos sphere and his ability to comprehend and understand the business requirements made him a valuable team player."

Thomas Dubach, Teamleiter Cognos Visualisierung, Global Finance IT (GFIT), UBS, Zürich

Project Marketing Management Information System

Implementation of the reporting requirements in Marketing Controlling along detailed

Umsetzung der Reportinganforderungen im Marketing Controlling nach präzisen specifications.

- Realisation of dynamic reports for flexible but still standardized reporting requirements.
- Elaborate design specifications according Corporate Design policies of UBS.

Presentation of marketing campaigns with key performance indicators, as a Gantt diagram in HTML, Excel and PDF format.

"In the project Marketing Management Information System (MMIS) Mr. Frank migrated the application over various Cognos versions and implemented new requirements into the existing application quickly and very dependably. The cooperation was always smooth and flawless, his work swiftly and reliable.

Oliver Rothenbach, Teamlead, Sales & Campaign Management, Group Finance IT (GFIT), UBS, Zürich

History of Projects - 7/11

	UBS Zürich	10/2007 – 06/2010
<p>Realized with:</p>	<p>Project Risk Datamart</p> <p>Overall responsibility for the reporting application in the project Risk Datamart. Supervision and analysis of the country and counterparty risks of UBS on group level.</p> <ul style="list-style-type: none"> • Migration, tuning and ongoing development of the Cognos components and their direct environments. • Administration and single point of contact for 2nd und 3rd level support. • Range of responsibilities from UNIX scripting over Process Monitoring, DB Tuning and Security Administration to Development of the Frontend with Push Mails and Alerting Features. <p>"In the project Risk Datamart Mr. Frank was responsible for designing and implementing the risk reports and cubes. In this role he has coordinated the developer team in Singapore to make sure resources are smoothly allocated. Additionally Mr. Frank worked fast and reliable on all issues arising from the periodical processing of the data and the generation of the cubes & reports and served in the 3rd level support in a proactive way. Many of his good ideas were taken for improving processes and for implementing new reports with additional benefit which was greatly appreciated by the users."</p> <p>Robert Niggli, Datamarts & Projects, Risk Control Operations, Risk COO, UBS, Zürich</p>	<p>Solaris, AIX, IWR, Cognos ReportNet, Cognos 8.2, Cognos 8.4 BI, Report Studio, Query Studio, Event Studio, Cognos 7.2 & 7.4 PowerPlay, Oracle, DB2, JCS, div.</p>
	Zurich Versicherung Zurich	04/2007 – 09/2007
<p>Description:</p> <p>Realized with:</p>	<p>Business analysis, design and implementation of a reporting application for a pricing system for property, liability, D&O and motor fleet insurances for corporate customers.</p> <p>Redesign, Maintenance and Migration of the reporting application in an asset system in the department of global corporate customers.</p> <p>Windows, Business Objects 5.1/6.5, MS SQL 2000, DB2 UDB</p> <p>"After a very short prep time Mr. Frank was able to support our needs very well. His valuable experiences in the field of Business Intelligence were a major asset and helped us in various projects to build a solid foundation for fulfilling the reporting requirements."</p> <p>Guido Jaeger, Program Manager, Global Corporate Europe IT, Zurich Financial Services</p>	

History of Projects - 8/11

Telekom Austria Wien		02/2007 – 04/2007
Description:	Implementation of a reporting application for the department Whole Sales National for analysing and reporting open phone line orders and the current service assets.	
Realized with:	Windows, Cognos Series 7, Cognos ReportNet, Teradata "Apart from his BI implementation and project management skills Mr. Frank was able to provide us with optimal support after a very short introductory time and deliver main parts to the project success. I can warmly recommend Mr. Frank." Dr. Thomas Pisar, DWH & BI CC, Controlling Applications, Telekom Austria AG	
DAK Hamburg		07/2006 – 11/2006
Description:	Project management creating and implementing a Management Dashboards for top corporate management. Central key metrics are extracted from numerous source systems and represented by traffic light status indicators.	
Realized with:	Windows, Cognos 8 BI	
Schering Bergkamen		10/2006 – 12/2006
Description:	Implementation of an automated batch reporting system. Data is extracted from various process control systems into a data warehouse and automatically reported upon for legal requirements are archived.	
Realized with:	Windows, Cognos DecisionStream, Cognos 8 BI, Oracle	
GEMA Berlin		05/2006 – 12/2006
Description:	Support of the implementation of a dialog system for controlling, correcting and analyzing a royalty payment system.	
Realized with:	UNIX, Windows, Cognos 8 BI, Oracle	

History of Projects - 9/11

BASF Ludwigshafen		06/2004 – 07/2005
Description:	Project management implementing an analysis system for financial results of the corporate group. Extraction of the consolidated results from SAP BW in a multi dimensional Cube and supply to worldwide controllers.	
Realized with:	Windows, Cognos Series 7, Cognos ReportNet	
Tesa Hamburg		04/2004 – 01/2005
Description:	Project management of the implementation of a quality- and logistics control system. Data from heterogeneous data sources was transferred into a data warehouse, consolidated and reported and analysed upon.	
Realized with:	Windows, Cognos DecisionStream, Cognos Series 7, Cognos ReportNet, Oracle	
Fiducia Karlsruhe		11/2002 – 02/2006
Description:	Support of the implementation of a Business Intelligence Solution in the computing center of Germans mutual savings banks.	
Realized with:	Windows, UNIX, Cognos Series 7, Cognos ReportNet, Cognos 8 BI, DB2	
Cognos Deutschland		04/2001 – 12/2006
Description:	<p>Numerous bigger and smaller implementation projects of Business Intelligence Solutions often in connection with a Data Warehouse at various customers (Examples):</p> <p>Insurances: Allianz, Euler-Hermes, AachenMünchener, AOK Niedersachsen, AOK Berlin, BKK, Nürnberger, Wüstenrot & Württembergische</p> <p>Finance: Dresdner Bank, GAD</p> <p>Healthcare: Boehringer, Sanofi Aventis, GlaxoSmithKline</p> <p>Telecommunication: O2, TollCollect</p> <p>Automotive: BMW, DaimlerChrysler, GM</p> <p>Others: Olympus; ifm electronics</p>	
Realized with:	Windows, UNIX, Cognos 6, Cognos Series 7, Cognos 8 BI, Cognos DecisionStream, SQL, Oracle, DB2, MS SQL	

History of Projects - 10/11

K S associates Berlin		12/2000 – 03/2001
Description:	Business analysis, concept and implementation of financial reorganization at an engineering company for civil engineering and landfill building in northern Germany.	
Realized with:	MS Office	
Abakus Wertkontor Berlin		05/2000 – 11/2000
Description:	Management and creation of an Internet StartUp. Recruitment of employees, financial planning, product development, installation of office infrastructure, business plan, search for investors	
Realized with:	Windows, MS Office	
Landesbank Baden Württemberg Stuttgart		03/1999 – 09/2000
Description:	Support and improvement of the electronic asset trade system Reuters Kondor	
Realized with:	Windows, UNIX, Sybase, SQL, Skript, Kondor	
Landesbank Baden Württemberg Stuttgart		03/1999 – 09/2000
Description:	Improvement and enhancement of the electronic booking system in the back office of the derivate trade.	
Realized with:	Windows, UNIX, Sybase, SQL, Skript	
SAP Walldorf		09/1998 – 11/1998
Description:	Quality Management R3-FI. Implementation of a hierarchical system of Computer Aided Test Tools (CATT).	
Realized with:	Windows, SAP R3 FI, CATT	

History of Projects - 11/11

Siemens Munich		03/1998 bis 05/1998
Description:	Development and Implementation of a software simulation for a special scheduling algorithm for a telecommunication system.	
Realized with:	Windows, C++	
Deutsche Bank Frankfurt		07/1997 – 10/1997
Description:	Implementation of an application for managing risk and credit lines in inter bank business.	
Realized with:	Windows, OS2, UNIX, DB2, SQL, REXX	
Price Waterhouse Coopers Berlin		07/1996 – 03/1998
Description:	System administration und PC-Support	
Realized with:	Windows, Lotus Notes, Datev, MS Office, zahlreiche Tools und Utilities	
Humboldt Universität Berlin		10/1995 – 02/1997
Description:	Implementation and maintenance of the web site of the Institute for Operations Research	
Realized with:	UNIX, HTML, MySQL	
IT-Services and Solutions GmbH Berlin		02/1996 – 04/1996
Description:	Implementation of an internal Application for reporting work time.	
Realized with:	MS Excel, VBA, Windows	