

# Thomas Baio

Toronto, Ontario  
(647) 717-2563 - thomas@baio.pro

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## PROCESS RE-ENGINEERING SPECIALIST

Professional focused on process optimization and operational reengineering. An expert in designing and deploying automation solutions, I reduce costs while enhancing efficiency and data reliability. A Certified ScrumMaster and strategic leader, I drive the transformation of business processes through innovative approaches tailored to demanding environments, effectively engaging stakeholders to achieve tangible results.

### – HIGHLIGHT OF COMPETENCES –

- Certified ScrumMaster
- Integrative thinking
- Business acumen
- Automation Languages
- High efficiency
- Data automation
- Attention to detail
- Continuous Improvement
- Leadership

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## PROFESSIONAL EXPERIENCE

### PROCESS RE-ENGINEERING SPECIALIST | Richardson Wealth

Since October 2024

Analyze and map current business processes to identify inefficiencies and potential improvements. Design and implement innovative and scalable automation solutions that streamline operations and reduce manual errors. Develop and execute process optimization strategies using Lean, Agile, and data-driven methodologies. Collaborate with cross-functional teams and engage stakeholders to drive successful process transformation initiatives. Monitor performance metrics and implement continuous improvement measures to sustain long-term operational excellence.

#### KEY ACHIEVEMENTS:

- **In Progress.**

### DATA ANALYTICS & ENABLEMENT SPECIALIST | Richardson Wealth, Toronto, Canada

June 2023 – October 2024

Develop and optimize data-driven solutions by designing reports, dashboards, and automation tools that enhance decision-making and operational efficiency. Leverage SQL, Power BI, and analytics to interpret complex data, streamline processes, and drive business insights. Assess data dependencies, improve reporting accuracy, and implement automation to reduce manual effort. Collaborate with stakeholders to enhance data accessibility, optimize key processes, and support strategic initiatives. Stay ahead of industry trends to continuously improve analytics capabilities and business enablement.

#### KEY ACHIEVEMENTS:

- **Mitigated** financial risk on **\$1.4M** by **taking ownership** of a project involving government filings
- Secured **\$540K in cost savings** from June 2024 to January 2025 by implementing a zero-cost alternative solution to address a targeted issue
- Achieved a **115% performance** rating in 2024.

### SENIOR SOLUTIONS SPECIALIST, IQ TEAM | CI Financial

May 2021 – June 2023

Analyze data and model business processes to identify opportunities for improvement and inefficiencies. Design solutions to optimize existing business processes and improve customer experience. Develop effective automation solutions to streamline business processes. Use of methodologies such as Agile and Scrum to manage the project end-to-end, from ideation to delivery, while ensuring timely delivery. Communicate with stakeholders to ensure that objectives and expectations are clearly understood and met. Understand needs and expectations to provide regular updates and ensure stakeholder satisfaction, including the client. Use techniques such as critical thinking, creativity, and collaboration to solve problems and maintain continuity of business operations. Developing automation solutions for internal tasks and processes (at zero cost to the company), greatly increasing efficiency. Act with delegated authority in the absence of the Manager. Sharing acquired experience with the team members through mentorship.

#### KEY ACHIEVEMENTS:

- **Led** cross-functional teams in the **development** and implementation of **data automation** projects, resulting in **successful** project completion and **improved** cross-functional relationships
- **Implemented** data integration solutions that **streamlined** the flow of data between different systems, resulting in **improved** data quality and **reduced** manual errors
- **Reduced** manual data processing tasks by designing and implementing automation scripts and workflows, resulting in **significant** time and cost **savings** for the organization.

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## **SUPERVISOR, IQ TEAM** | CI Financial

*December 2021 – July 2022*

In the prolonged absence of the team supervisor and concurrently with the position of Senior Solutions Specialist. Manage, assist, develop, and motivate team members to consistently provide the best possible service. Prepare and conduct monthly performance reviews of team agents and ensure their satisfaction. Ensure strong adherence to Key Performance Indicators (KPIs) and report them to the management team. Use this opportunity to expand avenues of communication and learning with the team members through mentoring.

## **SOLUTIONS SPECIALIST, IQ TEAM** | CI Financial

*Sept. 2019 – May 2021*

Supporting our Sales Team and Financial Representatives by investigating complex and escalated account related inquiries. Identifying opportunities to help our Service Centre knowledge provide better service-focused solutions on every question, including complex tax, registered plan and estate or trust issues. Deeply involved in the identification, review and development of business policies, operating processes and analytics of the team, with a goal to ensure operational efficiency. Participation in ad-hoc projects and initiatives to better answer company's needs and efficiency.

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## **EDUCATION (CERTIFIED IN CANADA)**

**Master's Degree (equiv. MSc) in Portfolio Management - 2015** | Université Paris XII, Paris, France

**Master's Degree (equiv. MSc) in Banking, Finance and Insurance - 2014** | Université Montpellier 2, France

**Bachelor's Degree in Banking, Finance and Insurance - 2012** | IFC Montpellier, France

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## **INTERESTS**

### **MUSIC**

- Playing electric & Flamenco guitars
- Started creating electronic music using a LaunchPad, a LaunchKey & Ableton Live.

### **SPORT**

- Tennis: 10-year club experience and formerly nationally ranked 15/4
- Structured fitness routine, training six days a week, fostering discipline, resilience, and goal-setting.

### **CULINARY ART**

- Passion born from a one-year experience in total immersion in the United Kingdom as a Chef de Partie, validated by a BTS (French diploma of technical college studies) and 5 years invested in the profession (Chef de Partie then Head Chef).

### **LITERATURE**

- Scrum: The Art of Doing Twice the Work in Half the Time - Jeff SUTHERLAND
- Thinking, Fast and Slow - Daniel KAHNEMAN
- The Psychology of Money - Morgan HOUSEL.