

Anupama Balajee

IT & BUSINESS OPERATIONS STRATEGY | PROGRAM MGT | M&A
INTEGRATION | REGULATORY PROGRAMS | DIGITAL
TRANSFORMATION

OBJECTIVE

Seeking a strategic leadership role to deliver enterprise value through leading complex global portfolios, executing end-to-end M&A integrations, and driving digital and regulatory transformations—bringing strong governance, stakeholder alignment, and data-driven decision-making to optimize outcomes.

EXPERIENCE

CONSULTANT, MERGERS & ACQUISITIONS/PROGRAM MANAGEMENT

Solenis, Wilmington DE, USA, 09/2023 - Present

- **Led end-to-end M&A integration programs**, partnering with business and functional leaders to **translate diligence findings into executable implementation plans**, including Day 1 readiness and Day 2 value capture.
- **Supported pre- and post-close diligence activities** by assessing integration complexity, identifying operational and technology risks, and validating assumptions related to timelines, costs, and synergies.
- Directed cross-functional global teams to deliver **20+ eCommerce and digital platform integrations**, ensuring alignment with investment objectives and business case outcomes.
- **Established governance frameworks and risk management practices**, enabling proactive identification, escalation, and mitigation of integration risks across multiple concurrent Day1, Day2 parallel tracks.
- Owned portfolio-level reporting and executive communications, **providing leadership with visibility into risks, dependencies, and value realization progress**.
- Partnered with vendors and internal teams to align SOWs, budgets, and delivery milestones with **strategic investment priorities and cost optimization goals**.
- **Established a single global standard** for product data, directing the consolidation of Digital Asset Management (DAM) and Global PIM platforms to drive enterprise operational efficiency and data consistency.
- **Accelerated customer value** by **leading** the deployment of critical features (e.g., credit card payments, shipment tracking) that enhance customer experience across global e-commerce sites.

DIRECTOR, DIGITIZATION AND BUSINESS CHANGE

BNY Mellon, Pittsburgh, PA, USA 03/2020 - 05/2021

- Directed enterprise-wide programs by **structuring complex, ambiguous problem statements and enabling leadership decision-making through data-driven insights and scenario analysis**.
- **Directed a diverse program portfolio**, including leading the enterprise-wide COVID-19 resiliency analysis, and governing major AML and digital transformation initiatives.



CONTACT

abalajee@gmail.com

(412)-818-8651

Pittsburgh, PA

SUMMARY

- 15+ years of progressive leadership experience in strategic program/portfolio management primarily in financial services and recently in other industries.
- Experienced in delivering high-visibility programs in governance- and compliance-driven environments, regularly reporting to Steer-Cos and executive management.
- Expert in establishing program governance, driving operational efficiency, and realizing synergies through technology and process optimization.
- Highly analytical and organized, with a track record of effective stakeholder communication and risk management at executive levels.

www.linkedin.com/in/anupamabalajee

EDUCATION

Essec Mannheim Business School

2011-2013, Paris, France

Executive MBA

R V College of Engineering

1989-1993, Bangalore, India

Bachelor's degree in Electronics & Communications Engineering.

TRAINING/CERTIFICATIONS

- **SAFe 6.0 SCRUM Master** ® (06/25)
- **SAP Activate** ® 100 Training (01/25)
- **CPMAI - PMI** ® In Progress
- **M&A Science Academy** In Progress

BNY Mellon – Director Digitization & Business Change Cont'd

- **Instituted program governance** and provided executive direction that ensured the on-time delivery of critical regulatory initiatives (MRA response, KYC) within a governance-driven environment.
- **Championed and led** the redesign of client fund migration processes, **resulting in significant time and cost savings** and improved operational efficiency.
- Delivered regular status updates, project dashboards, and risk logs to senior leadership and sponsors.

DIRECTOR, BUSINESS RISK AND REGULATORY UNIT

UBS, Zurich, Switzerland, Europe, 06/2013 - 06/2017

- As a global Regulatory Lead, I **governed** a sensitive high budget program for EMIR and MiFID regulatory solutions, **directing implementation** across 15 European locations to secure compliance.
- **Cultivated strategic partnerships** with global stakeholders and internal clients to define requirements, **translate regulatory mandates into technical delivery**, and ensure compliance alignment.
- Instrumental in Wealth Management-wide Risk Operating Model redesign, ensuring alignment with regulatory requirements and best practices.
- **Represented the Bank** at industry forums like FIA and ISDA, contributing to the development of consensus on regulatory compliance and innovative client outreach strategies.
- **Served as the primary interface and subject matter expert** to the Group Derivative Regulatory Risk Board and the Executive Steering Committee for global Clearing Regulations compliance.

VICE PRESIDENT, INFORMATION TECHNOLOGY

Bollinger Insurance, NJ, USA, 08/2006 – 01/2008

- Reporting to the CIO, I managed M&A integrations, closed backlog from previous acquisitions and for future state implemented onboarding process for M&A staff, **reducing systems availability time from 3 weeks to 2 days**.
- **Streamlined M&A activities** related to previous acquisitions by consolidating software licenses and contracts, enhancing operational efficiency.
- Effected SLAs for co-located Datacenter, implemented tighter perimeter security and new email filtering system.

OPERATIONS MANAGER, INFORMATION TECHNOLOGY

St Paul Travelers, NJ/NY/Mn USA, 07/2001 – 08/2006

- As the IT/OPS Integration lead, I spear headed systems integration for St Paul Re and Travelers Merger, Platinum Re divestiture and Gulf Re acquisition, improving operational effectiveness.
- Oversaw operations and helpdesk support for the merged entity, demonstrating adaptability and leadership.
- Led process improvement initiatives for the merged organizations evolving common standards and policy consistencies.

Previous Experiences -

- **LOTUS DOMINO CONSULTANT, MARKET SURVEILLANCE - NEW YORK STOCK EXCHANGE (NYSE), NY USA, 08/1998 – 06/2001**
- **LAN ADMIN, INFORMATION TECHNOLOGY - CONSTRUCTION SPECIALTIES GROUP, NJ, USA, 06/1998 – 08/1998**
- **SENIOR SYSTEMS EXECUTIVE, INFORMATION TECHNOLOGY - NIIT LTD, BLR/DEL/CH, INDIA, 03/1994 – 01/1998**

TRAINING/CERTIFICATIONS (CONT'D)

- Program Management Professional Training (**PgMP PMI**®)

CORE SKILLS

- M&A Integration & Strategy | Diligence Coordination | E2E Execution
- IT/OPS Strategy & Program Management
- Regulatory Compliance
- Budget Planning & Execution
- Cross-Functional Leadership | Stakeholder Management
- Business Analysis and Solutioning
- Mentoring & Career Planning
- Vendor and Contract Management (resources and services)

M&A DILIGENCE & INTEGRATION

- Operational, and technology diligence support
- Integration strategy, Day 1 / Day 2 planning
- Synergy identification and value realization tracking
- Risk identification, mitigation, and governance
- Cross-functional execution across business and technology
- Stakeholder alignment across investment, business, and delivery teams

TOOLS

- MS Office Suite (Excel/ PowerPoint /Word)
- Smartsheets | MS Project
- JIRA | Draw.io | Miro
- SharePoint
- Service Desk
- Teams | Zoom