

Academic Profile

Practitioner-scholar and educator specializing in business analytics, information systems, project management, agile thinking, business intelligence, and digital transformation. Experienced in designing and delivering graduate and undergraduate courses that connect academic theory with applied industry practice through hands-on learning, analytics tools, case-based instruction, and student-centered pedagogy. Brings extensive executive-level experience in FP&A, BI implementation, finance transformation, and technology-enabled organizational change to teaching, curriculum development, student mentoring, and applied research.

Education

- PhD Technology Management, University of Bridgeport, School of Engineering, Bridgeport, CT, 2023
- MS Enterprise Analytics, Pace University, Seidenberg School of Computer Science, NYC
- MS Finance, Pace University, Lubin School of Business, NYC
- MBA, West Chester University, West Chester, PA
- BA, University of Delaware, Newark, DE

Academic Appointments

University of Massachusetts, Amherst - Isenberg School of Management

Lecturer, Operations and Information Management (01/24 to Present)

Supporting graduate, student-centered education and contributing to course development for nationally ranked MSBA, MBA, and MF programs.

- John F. Kennedy Isenberg Teaching Fellowship recipient for the 2026–2028 academic years. Providing support for faculty at Isenberg with emerging workplace technologies and platforms such as DataCamp, TopHat, ScreenPal, and others. Two year appointment designed to foster teaching excellence and drive technological integration across Isenberg.
- Delivering graduate-level courses within the Isenberg School of Management, including Business Application Development with Python (MGMT 609), Mastering Agile Scrum (MGMT 658), Project Management (MGMT 656), and Project Risk Management (MGMT 690k).
- Designed and developed new graduate courses to address emerging industry trends and provide hands-on learning opportunities including:
 - Mastering Agile Scrum (online): first delivery Spring 2024
 - Project Risk Management (online): first delivery Fall 2025
- Contributed to Business Application Development with Python (MGMT 609) course design and development, integrating strategy and analytics to align with the MSBA program's curriculum goals and prepare students for leadership roles in business and technology sectors.
- Supported departmental reporting on graduate program industry placement and outcomes trends in partnership with the Graduate Programs Office and Career Services.
- Partnering with the Graduate Programs Office on initiatives including practicum course development, accreditation efforts, and curriculum enhancements.
- Acting as a departmental industry liaison, fostering partnerships with the University's business community, collaborating on industry networking events, and facilitating data collection for graduating students to enhance post-graduation employment outcomes.
- Providing mentorship and coaching to graduate students, emphasizing job market skill development, academic success, and career advancement.

Additional Teaching Experience

University of New Haven – Pompea College of Business

Graduate courses delivered: BANL 6430 Relational Database Management for Analytics (SQL)
BANL 6600 MS Power BI and Dashboarding

Quinnipiac University – School of Business

Undergraduate course delivered: CIS 101 Introduction to Info Systems (Intro to Application Development)

University of Bridgeport – College of Engineering, Business, and Education

Graduate course delivered: IS ITKM 505 Enterprise Intelligence and Decision Support Systems (SAP)

Correlation One – Workforce Development

Corporate training on Data Literacy for Johnson & Johnson and a private investment firm.

Recent Awards and Fellowships

- 2026–2028 UMass Amherst, John F. Kennedy Isenberg Teaching Fellow
- 2026 UMass Amherst Isenberg Video Development Institute member and award recipient
- 2026–2027 UMass Amherst Center for Teaching and Learning (CTL) TIDE Ambassador Fellow
- 2025 UMass Amherst Isenberg Teaching with Digital Technology Award recipient
- 2025–2026 UMass Amherst IDEAS Instructional Innovation Fellow
- 2021 CT Next - University of Bridgeport Innovation Grant for “Identifying a Hybrid Agile Waterfall Implementation Framework for Modern Business Intelligence Solutions”

Applied Industry Experience

Tenerity, Inc. - Stamford, CT

SENIOR DIRECTOR, FP&A AND TRANSFORMATION – GLOBAL OPERATIONS & IT (04/22 to 11/23)

- Global Operations FP&A leader, acting as the primary finance business partner for the COO and CIO while supporting operational and functional segments, including PMO, Billing Operations, Information Protection, IT Shared Services, Facilities, Application Development, Service Delivery, and Sourcing.
- Provided leadership for onshore and offshore FP&A analysts assigned to operational vertical support.
- Acted as planning and analytics SME on OneStream implementation efforts and optimization efforts to realign organizational hierarchy segments in Oracle Essbase reporting.
- Provided thought leadership on finance transformation, information delivery, and analytics across FP&A. Led discussions to enhance reporting capabilities and transition to more advanced analytic approaches via MS Power BI. Led the buildout of expense analytics and KPI production via the BI environment.
- Partnered on the development of the five-year strategic plan, annual budget, and monthly forecasts. Provided variance explanations and consolidated roll-up reporting from various team members.
- Reviewed business-driven project proposals for inclusion in budgets for both OpEx and CapEx spend.

XPO Logistics - Greenwich, CT

FINANCE TRANSFORMATION, SENIOR MANAGER (8/2018 to 04/2022)

Supported the Finance Shared Services organization as part of the Transformation and Strategy team, leading operational improvement efforts, systems enhancements, FP&A leadership, and reporting automation.

- *Business Intelligence Leader – Championed the planning and execution of Finance Business Intelligence (BI) efforts, including team leadership in various verticals to ensure fast value delivery across operational and corporate finance on Finance BI platforms via PowerBI.com as a primary data visualization tool and later Google Looker.*

-
- Led the automation of 60%+ of financial reporting for Order-to-Cash (GBS) processes.
 - Led the transition of monthly FP&A P&L, T&E, vendor, and payments analytics from Excel to interactive BI environments, providing more in-depth analytical capabilities.
 - Defined reporting and analytic needs with Finance Shared Services leadership.
 - Drove PowerBI adoption to 300+ unique finance users monthly with ~10,000 page visits by Q4 2020 with users from Portland, OR to Pune, India, and dozens of cities in between.
 - Acted as a champion of Agile development methodologies by pushing for fast value delivery and iterating minimally viable products until departmental requirements were met.
 - *Finance Transformation Leader* – Led project implementation from a functional FP&A perspective for Oracle ePBCS (Hyperion Planning). Acted as functional business lead for CFO funding approval, vendor selection, contract requirements consultation, and initial rollout. Concurrently served as a key functional stakeholder providing guidance on Oracle eDMCS deployment and Hyperion Financial Management (HFM) rollout.
 - Led process design for enhanced efficiency in operational finance, specifically across AR collections, billing operations, and AP processes. Collaborated on strategy enhancements to reduce DSO, increase first invoice accuracy, and reduce bad debt.
 - Led development of robust customer satisfaction surveys, gaining feedback from approximately 295 users on BI platforms and tracking BI success versus manual environments. Also built and analyzed results for a Coupa satisfaction survey and analyzed Finance department results for the company-wide employee satisfaction survey on behalf of the CFO.
 - Led FSS benchmarking activities in partnership with The Hackett Group to understand the total cost of completing processes versus best-in-class benchmarks.
 - *FP&A Leader* – Led the annual budgeting and monthly forecasting process for the global Finance Shared Services organization.
 - Recommended strategies for achieving cost reductions while exceeding operational goals.
 - Led offshore FP&A team, ensuring monthly deliverables were completed on time and accurately.
 - Provided P&L analytics and ad-hoc executive support, aligning investments with outcomes.

Cantor Fitzgerald - New York, NY

SVP, FP&A AND TRANSFORMATION (10/2015 to 6/2018)

Led the Management Information reporting function while acting as IT and Back Office FP&A leader.

- *Budgeting and forecasting leadership* – Led the strategic planning and monthly forecasting process for shared service operational functions and IT. Developed a global planning framework. Led a team of senior analysts in NYC and London supporting the monthly forecast and annual budgeting process across Information and Technology, Operations, and other back-office functions.
- *Analytics and Reporting Leader* – Partnered with operational leaders to provide Business Intelligence capabilities with Oracle Data Visualization Desktop and Power BI, giving real-time insight into volumes, productivity, and cost drivers. Built a chargeback model with tiered pricing based on risk profiles for new client requests by leveraging operational analytics. Headed the reorganization of data hierarchies to reflect key organizational performance metrics.
- *Program Management* – Led implementation projects for Oracle Planning (Hyperion) and Fusion Analytics as a product owner for the finance department, driving vendor selection, initial requirements scoping, and project kickoff.

GE Capital - Stamford, CT

FINANCIAL PLANNING & ANALYSIS MANAGER – TREASURY OPERATIONS (10/2014 to 10/2015)

Acted as Operational Expense Leader and budget owner for GE Capital's Treasury business unit.

- *Analytics and Reporting Leader* – Provided monthly P&L and balance sheet reporting for Treasury's total OpEx footprint, focused on Technology and Operations spend and total cost of ownership by product grouping.

- *Budget and Forecast* – Partnered with Treasury leadership in developing rolling quarterly budgets. Drove corporate budgeting strategy within the business unit, collaborated on identifying cost optimization opportunities, pinpointed and communicated risks and opportunities, and delivered business-aligned strategic planning.
- *Project Management* – FP&A SME and Product Owner for the Treasury department implementation of Oracle/Hyperion Planning.

Citigroup - New York, NY

VICE PRESIDENT, FP&A – OPERATIONS AND TECHNOLOGY (10/2010 to 10/2014)

- *Budget and Forecast* – Spearheaded the budgeting and forecasting process, as well as budget reduction and cost optimization initiatives for shared services and technology.
- *Controllershship* – Owned IT product costing for Data Center and non-Data Center products, technology product rate card buildout, and global IT and Operations budgeting. Led IT product benchmarking with Gartner efforts to understand the competitive space. Maintained software amortization schedules and CapEx costing models.
- *Project Management* – Served as functional business partner and SME on the implementation of Acorn Advanced Analytics and, subsequently, an ITFM tool for IT costing. Acted as Product Owner for the finance team, translating departmental needs and priorities to IT implementation partners.

Additional Experience

SENIOR FINANCIAL ANALYST - eBay Enterprise (GSI Commerce), King of Prussia, PA (01/09 to 10/10)

FINANCIAL ANALYST III - Wells Fargo Auto Finance, Chester, PA (01/06 to 01/09)

COLLECTIONS SPECIALIST – Chrysler Financial, Horsham, PA (12/2004 to 01/06)

Certifications and Credentials

- Project Management Professional (**PMP**) – Project Management Institute – 2020
- PMI Agile Certified Practitioner (**PMI-ACP**) – Project Management Institute – 2020
- Scaled Agile Advanced Scrum Master (**SASM**) – Scaled Agile / SAFe – 2020 (expired)
- Professional Scrum Master (**PSM I**) – Scrum.org – 2024
- Advanced Diploma in Global Business Services (**ADGBS**) – Hackett Institute – 2019

Technical Skills

- | | |
|--|--|
| • Oracle EPM (ePBCS, Hyperion Planning, HFM, eDMCS, Smartview, Fusion, OBIEE) | • MS Project, Smartsheet, Monday.com |
| • BI Tools (MS Power BI, Tableau, others) | • Canvas and Blackboard LMS |
| • RPA (Automation Anywhere) | • MS Streams, Clipchamp, Canvas Studio, Top Hat, ScreenPal |
| • Data Modeling (Alteryx, Power Query) | • MS Excel, PowerPoint, Word |
| • Programming with Python (Intermediate), R (beginner), and SQL (Intermediate) | • Google Docs, Sheets |
| | • GenAI prompt engineering |

Academic Service and Professional Engagement

- 2025 Project Management Institute SNEC Agilist Outreach Committee volunteer member
- Operations and Information Management Department Industry Liaison
- 2022–2023 University of Bridgeport Curriculum Development Committee member

Selected Publications

Journal Articles:

- ✓ Williams, R., Baldwin, C., and Walsh, K., (2026). *Teaching Python for Business Analytics Students in the Age of AI*. Manuscript submitted for publication.
- ✓ Williams, R., Duman, G., Kongar, E., & Sheikh, N. (2024). Organizational factors enabling augmented analytic and BI 4.0 implementation success. *IEEE Engineering Management Review*. <https://doi.org/10.1109/EMR.2024.3506865>
- ✓ Williams, R., Duman, G., Kongar, E., & Tenney, D. (2023). Understanding business intelligence implementation failure from technology, organization, and process perspectives. *IEEE Engineering Management Review*. <https://doi.org/10.1109/EMR.2023.3331247>
- ✓ Williams, R., Sheikh, N., Duman, G., & Kongar, E. (2022). Critical success factors of business intelligence systems implementation. *IEEE Engineering Management Review*. <https://doi.org/10.1109/EMR.2022.3197096>
- ✓ Williams, R. (2023). *Evaluating critical failure factors for business intelligence systems implementation from technical, organizational, and process perspectives using AHP* [Doctoral dissertation, University of Bridgeport]

Conference Paper:

- ✓ Williams, R., & Sheikh, N. (2022, August 8). Technical, organizational, and process impacts of business intelligence implementation failure. In *Proceedings of PICMET '22: Technology Management and Leadership in Digital Transformation – Looking Ahead to the Post-COVID Era*.

Book Chapters:

- ✓ Williams, R., Duman, G., & Kongar, E. (2024). Achieving a data-driven culture for the post-digital era. In A. Erkollar & B. Oberer (Eds.), *Digital transformation: Essential insights for modern educators and industry leaders*. ETCOP Institute for Interdisciplinary Research.
- ✓ Flamini, R., Williams, R., Duman, G., & Kongar, E. (2024). Accelerating client adoption in digital interactions. In A. Erkollar & B. Oberer (Eds.), *Digital transformation: Essential insights for modern educators and industry leaders*. ETCOP Institute for Interdisciplinary Research.

Recent Continuing Education and Professional Development

- ✓ Instructional Video Creators Network, UMass Amherst interdepartmental collaboration – Fall 2025
- ✓ Introduction to Cognitive Project Management in AI (CPMAI) – PMI.org – 3 hours - June 2025
- ✓ Generative AI for Project Managers – PMI.org – 5 hours – May 2025
- ✓ Data Landscape of GenAI for Project Managers – PMI.org – 5 hours – May 2025
- ✓ AI Business Fundamentals – DataCamp.com – 11 hours – May 2025
- ✓ Fundamentals of Case Teaching – Harvard Business Publishing Education – 6 hours – March 2024
- ✓ Essentials of Online Teaching – UMass IDEAS – 10 hours – April 2024
- ✓ Python Fundamentals – DataCamp – 15 hours – June 2024
- ✓ Machine Learning with Python Bootcamp – The Coding School – 40 hours – June 2024
- ✓ Machine Learning with Python Bootcamp II – The Coding School – 40 hours - July 2024