

# Thomas Baio

Toronto, Ontario  
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## PROCESS RE-ENGINEERING SPECIALIST

*Senior Innovation Leader driving enterprise transformation through scalable digital platforms and intelligent automation. Translates complex operational challenges into production-ready solutions that accelerate delivery and enable organizational agility. Architects low-code ecosystems, automates workflows, and establishes governance frameworks balancing innovation velocity with compliance. Recognized for feasibility-first thinking and bridging technical and business stakeholders to deliver sustainable platforms that reshape operations.*

### — CORE COMPETENCES —

- Bilingual English/French
- Low-Code Solution Design
- ROI Validation
- Process Automation
- Enterprise Scalability
- Continuous Improvement
- Workflow Orchestration
- Data Integration
- Cross-Functional Leadership

## PROFESSIONAL EXPERIENCE

### PROCESS RE-ENGINEERING SPECIALIST | Richardson Wealth

*Since October 2024*

Architect and implement enterprise-grade automation solutions that eliminate operational bottlenecks and accelerate business delivery. Lead cross-functional initiatives to digitize manual workflows, establish scalable governance frameworks, and deploy low-code platforms that drive measurable efficiency gains. Conduct feasibility assessments of emerging technologies and optimize business processes using Lean and Agile methodologies. Enable stakeholders to adopt innovation through structured change management and continuous improvement practices.

#### KEY ACHIEVEMENTS:

- Designed and deployed a **zero-cost** digital advisor onboarding platform, saving **150-200 hours** annually
- Launched **10 zero-cost automation solutions** across advisory operations, achieving **80-100% effort reduction**
- Digitized complex account workflows, reducing error rates from **60-80% to 0-20%**, cutting turnaround by **75%**.

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

*June 2023 – October 2024*

Design and deliver data-driven insights and automation solutions that enable operational excellence across advisory and corporate teams. Develop enterprise dashboards, conduct advanced analytics using SQL and Power BI, and proactively identify opportunities to automate reporting and streamline workflows. Partner with cross-functional stakeholders to assess business processes, solve complex operational challenges, and deliver innovative solutions that reduce manual effort while ensuring data accuracy and system integrity. Stay current on industry trends and emerging technologies to continuously enhance service delivery and organizational efficiency.

#### KEY ACHIEVEMENTS:

- Mitigated **\$1.4M in financial risk** by independently reconciling and balancing **600+ RESP accounts**
- Engineered a **zero-cost** solution to replace our decommissioned filing platform, achieving **\$720K in cost savings**
- Achieved a **115% performance** rating in 2024.

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

*May 2021 – June 2023*

Analyze business processes and operational workflows to identify inefficiencies and design scalable automation solutions that enhance service delivery and customer experience. Lead end-to-end solution development using Agile and Scrum methodologies, translating complex business requirements into actionable technical implementations. Collaborate with cross-functional stakeholders to ensure alignment on objectives, timelines, and deliverables while maintaining operational continuity. Leverage critical thinking and creative problem-solving to develop zero-cost automation solutions that dramatically improve efficiency. Mentor team members through knowledge sharing and act with delegated authority during leadership transitions.

#### KEY ACHIEVEMENTS:

- Designed and deployed multiple automation solutions for internal operations at **zero cost**, significantly increasing operational efficiency and reducing manual processing time by **65%**
- Engineered data integration solutions that **streamlined** cross-system data flow, **improving** data quality and **eliminating** manual errors across service delivery operations.
- Eliminated manual data processing tasks by designing and implementing automation scripts and workflows, delivering significant time and cost savings for the organization.

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

December 2021 – July 2022

Provide interim leadership for the service delivery team during extended management absence, ensuring operational stability and team performance. Manage, develop, and motivate team members to consistently deliver exceptional service while maintaining adherence to KPIs. Conduct performance reviews, foster employee satisfaction, and expand communication channels through mentoring and coaching initiatives.

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

Sept. 2019 – May 2021

Provide tier-2 escalation support for complex account-related inquiries, leveraging deep technical knowledge of tax, registered plans, estates, and trust structures to deliver service-focused solutions. Identify opportunities to enhance knowledge base resources and operational processes, ensuring the service center operates with maximum efficiency. Actively participate in business policy development, process optimization, and analytics initiatives to drive continuous improvement. Collaborate on ad-hoc projects and strategic initiatives that address evolving business needs while maintaining exceptional service standards for sales teams and financial representatives.

## **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

## **SKILLS**

- Certified ScrumMaster (100%)
- Lean Six Sigma White Belt
- Financial Markets Authority (98%)
- Extreme knowledge of Office 365, including VBA
- Advanced Automation & Analytics: PowerApps, Power Automate, PowerBI, VBA
- Enterprise & Collaboration Tools: DevOps, Salesforce, JIRA, Confluence, SharePoint
- Data & Business Intelligence: SQL, SSMS, Tableau, SAP BI, Business Objects, Morningstar
- Workflow & Identity Management: Okta, ADP, Workday, Calabrio

## **INTERESTS**

### **ON THE ROAD**

- Motorcycle enthusiast & Triumph owner, always geared up and ready to hit the open road chasing adrenaline.

### **MUSIC**

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

### **SPORTS**

- Tennis: 10-year club experience and formerly nationally ranked 15/4, building character and resilience
- Fitness: Structured 5-day weekly training routine, fostering discipline and mental clarity
- Padel: Adopted this 'best of both worlds' between tennis and squash in 2025 to keep the learning agility sharp.

### **CULINARY ART**

- Professional culinary background developed through one-year immersive experience in the United Kingdom as Chef de Partie, formalized by a BTS (French technical college diploma). Advanced through five years in the profession, progressing from Chef de Partie to Head Chef, cultivating discipline, precision, and creative problem-solving skills that translate today into meticulous attention to detail.

### **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.