

JOAQUIN WILSON, MBA

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PROFESSIONAL SUMMARY

Portfolio: <https://joaquinwilson.com/>

MBA consultant with 5+ years at Accenture, KPMG, and IBM leading transformation, AI adoption, and process improvement for federal and enterprise clients. Delivered \$634K in commercial outcomes through stakeholder workshops, executive roadmaps, and AI-enabled delivery across ServiceNow and PEGA engagements

CONSULTING SKILLS

Business & Growth Strategy Development | Strategic Roadmap | Competitive Research & Analysis | Financial & Business Analysis | AI Process / Workflow Redesign: Zapier, Claude, Notebook Im, Claude Code, ChatGPT, Gemini | Process Improvement | Stakeholder Engagement | Data Synthesis & Analysis | Agile Delivery (Scrum, SAFe) | AI Adoption |

PROFESSIONAL EXPERIENCE

ACCENTURE

Feb. 2024 – May 2025

Strategy and Consultant, Senior Business Analyst

(Federal Program Impacted)

Consultant leading business strategy development, process optimization, & technology enablement for federal clients

- **Strategic Enablement:** Drove 83% adoption across 9 teams by stakeholder interviews into strategic rollout decisions.
- **Requirements Gathering:** Translated IRS tax processing rules into 150+ user stories during DCO sessions, capturing requirements directly in Pega Agile Workbench to accelerate documentation by 40%.
- **Workflow Design:** Mapped 10 core taxpayer Microjourneys using Pega Blueprint and App Studio, defining case lifecycles, personas, and SLA escalation rules to replace manual routing.
- **Backlog Management:** Refined a 60-item product backlog in Pega Agile Studio, prioritizing taxpayer features by stakeholder impact and sprint capacity to meet Definition of Ready.
- **User Acceptance Testing:** Authored and executed 25+ UAT scripts for taxpayer-facing workflows, validating case routing logic and SLA escalation rules prior to production deployment.
- **Training Delivery:** Facilitated 10 hands-on workshops for 200+ federal employees on the new Pega Customer Service interface, reducing post-launch helpdesk tickets by 30%.

KPMG US

Dec. 2021 – Jul. 2023

Strategy & Process Analyst

Support tax compliance strategy for corporate entities by applying financial analysis & continuous process improvement

- **Financial Analysis:** Top 3 analyst by building scorecards across 98 entities to drive executive prioritization decisions.
- **Process Improvement:** Increased team accuracy 91%, saving 97+ hours by designing 16 capability-building workshops.
- **Executive Communications:** Accelerated reporting cycles 68% across 4 portfolios, designing executive briefing templates adopted by 40 analysts.
- **Business Analysis:** Monitored risk indicators in 9+ accounts, escalating 87+ issues to protect client retention & growth

IBM

May 2021 – Aug. 2021

Strategy & Competitive Intelligence Analyst (Internship)

MBA intern supporting strategy and competitive analysis across 11 enterprise accounts

- **Competitive Research & Analysis:** Identified 25% more opportunities by conducting competitive research on 11 enterprise accounts to surface growth triggers.
- **Situation Assessment:** Improved client performance 40% by synthesizing diagnostic findings into executive-ready situation assessment and strategic brief.

ADDITIONAL WORK EXPERIENCE (2025 – 2026)

OTIS WORLDWIDE CORPORATION

Sep. 2025 – Jan. 2026

Sr. Account Executive, Customer Success Analyst (Short-term 5-month Assignment)

Managed a \$5M enterprise portfolio across 228 accounts as Senior Account Manager during post-hurricane recovery

- **Growth Strategy:** Increased \$634K revenue by negotiating contracts with 87 clients to achieve quarterly targets.
- **Risk Analysis:** Renewed 27 of 30 at-risk contracts by building risk scorecards & delivering retention resolution analysis.
- **AI Adoption:** Introduced ChatGPT, Claude, & Gemini to 8 reps, achieving 90% team adoption and an 86% performance increase through shared prompt library and workflow automation
- **Proposal Storytelling:** Used Copilot, Gemini, Claude, and ChatGPT to draft tailored renewal presentations for 87 clients, cutting prep time 50% and improving meeting-to-close rate 20%

- **Workflow Automation:** Reduced client email response time 87% (24 hrs to 3 hrs) by configuring Zapier to trigger priority SMS alerts on keyword-flagged emails, enabling same-day resolution outside standard response windows

EDUCATION

Master of Business Administration, Leadership & Data analytics • GPA: 3.71

Florida International University

B.S Business Administration and Management

University of Florida

CERTIFICATIONS

- Google AI Professional Certificate (May. 2026)
- Certified Product Owner Scrum Professional (Apr. 2025)
- Certified SAFe® 6 Practitioner, Scaled Agile, Inc. (Jan. 2025).
- Agile Fundamentals, ICAgile, Inc. (May 2024)
- Google Prompting Essentials, Google (Apr. 2026)
- Agile Business Analyst, Development Group (Oct. 2024)
- Lean Six Sigma Green Belt, Six Sigma Institute (Jul. 2024)

CONSULTING & TECHNOLOGY SKILLS

Technology:

- **Microsoft Dynamics CRM:** Managed 228-account portfolio in Dynamics, configured custom risk scoring fields (SLA breach frequency, contract renewal date, payment history), built automated renewal pipeline dashboards, and generated weekly at-risk account reports to support retention prioritization decisions
- **ServiceNow:** Automated workflows, configured SLA escalation, built KPI dashboards
- **PEGA:** Defined case types, designed approval routing, set SLA thresholds
- **Tableau:** Built compliance scorecards across 98 entities
- **Finalistic, ZoomInfo & Seismic:** Automated account research tracking infrastructure upgrades, M&A activity, and tech stack changes to surface sales opportunities across 11 enterprise accounts
- **Jira:** Managed sprint backlogs, tracked 25+ action items, prioritized user stories
- **SAP:** Streamlined tax compliance reporting, automated analyst workflows across 98 entities
- **Advanced Excel:** Built PivotTables and XLOOKUP models to analyze compliance data across 98 entities
- **SharePoint:** Maintained project documentation, risk logs, and adoption metrics across federal workstreams
- **Microsoft Project:** Tracked delivery timelines and milestone dependencies across 4 cross-functional teams

Sourcing & Governance:

Vendor Coordination | SLA Performance Monitoring | Contract Risk Analysis | PMO Reporting | Risk Registers | Agile Delivery (Scrum, SAFe)

Languages:

English (Native) | Spanish (Native)