

Tino A. Lyons

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PROFESSIONAL SUMMARY

AI and operations professional with 7+ years of experience across financial services, global operations, analytics, and digital transformation. Currently leading client services and operational performance across programs supporting advocates and 100K+ monthly interactions while serving as the Client Services AI and automation SME. Experience translating business problems into technology enabled solutions, including developing a Microsoft Copilot agent, supporting an enterprise Genesys to AWS migration, and independently creating an AI enabled decision intelligence platform. Combines product thinking, data driven decision making, cross functional leadership, financial acumen, and hands on generative AI experience to deliver measurable business outcomes.

TECHNICAL SKILLS

Product Discovery & Problem Definition | Generative AI & Prompt Engineering | Microsoft Copilot | AI Agents & Workflow Automation | Digital Transformation | Cross Functional Delivery | KPI & Product Performance | Business Impact Analysis | Customer & User Experience | Responsible AI Awareness | Client & Stakeholder Management | Executive Communication | Process Improvement | Data Analysis | Power BI | Excel/VBA

PROFESSIONAL EXPERIENCE

Teleperformance (TP), Client Solutions Account Manager, Remote

Oct 2025-Present

- Leads client services and operational performance across global digital and voice programs supporting 2,000+ advocates and 100K+ monthly member interactions across onshore, India, Peru, and the Philippines.
- Serves as the Client Services AI and automation SME, translating operational challenges and stakeholder needs into AI enabled workflows, automation opportunities, and process improvements.
- Created CIPHER, the team's first Microsoft Copilot agent, designed to automate KPI risk identification and client health monitoring and enable more proactive performance management.
- Helped lead the Genesys to AWS migration across CS, MR, and DSNP operations, coordinating with cross functional stakeholders to support implementation, operational readiness, issue resolution, and adoption.
- Drove measurable business outcomes, improving the client partner scorecard from 2.5 to 3.87/4.0 and helping increase NPS from the 70s to 85, exceeding the client target of 80.
- Apply generative AI and prompt engineering to create client facing visual and video experiences showcased at summits and conferences, with content being adapted for employee onboarding and training.
- Lead cross functional execution across Operations, WFM, Quality, Training, leadership, and client stakeholders while delivering executive reporting, WBRs/QBRs, and managing \$200K–\$400K in twice monthly invoicing.

- Conceived and developed OpsIQ, an AI enabled decision intelligence platform designed to help operations leaders manage multiple accounts and LOBs through a centralized view of performance, risk, staffing, FTE lock, client health, and financial exposure.
- Designed intelligent workflows that analyze historical and current performance to surface KPI trends, operational risks, financial penalties, and recommended areas of attention, enabling more informed leadership decisions.
- Developed AI assisted executive capabilities for WBR/QBR generation and context aware communication drafting, adapting outputs to leadership workflows and relevant stakeholder distribution.
- Automated a Farshore AEP ramp tracking workflow to improve workforce visibility, documentation, organization, and operational readiness.

PepsiCo, Finance *Analyst Associate (Level 6) Trade Spend Control*, Winston Salem, NC**Dec 2024-Oct 2025**

- Analyzed complex contract terms (rate-per-case, lump-sum, support funds) to verify compliance and ensure timely, accurate disbursement of promotional funds.
- Prepared accrual and variance analysis reports aligned to financial close cycles, highlighting budget-to-actual discrepancies and enabling corrective action.
- Streamlined trade promotion payment processes by reconciling data from SAP and trade systems, accelerating approval cycles and improving payment accuracy for monthly disbursements.
- Authorized payments within policy thresholds, effectively eliminating exceptions and maintaining audit-ready controls.
- Generated and reviewed system reports to reconcile trade claims and promotions, contributing to cleaner general ledger accounts and audit readiness.
- Collaborated with sales and account teams to resolve payment variances, ensuring continuity of funding and adherence to contractual terms.

Computershare, *Senior Business Analyst, Global FX*, Newark, New Jersey**Feb 2023-May 2024**

- Supported external audits by coordinating custodial confirmations and validating investment data, ensuring compliance with regulatory standards.
- Managed end-to-end FX settlement workflow and resolved discrepancies with custodians and counterparties, maintaining robust controls for high-volume trades.
- Ensured precision of custodial account balances through daily cash and position reconciliations, cutting transactional errors by 25%.
- Automated trade reconciliation processes using advanced Excel/VBA macros, reducing monthly reconciliation time by 30% and improving data accuracy across custodial accounts.
- Produced comprehensive FX trade reports for senior management, enhancing visibility into global currency hedging and portfolio performance.

Bank of America, *Trade Control Business Analyst, Credit Derivatives Specialist*, Charlotte, NC Aug 2022-Feb 2023

- Led knowledge-sharing sessions to elevate team expertise in complex trade workflows and exception management.
- Collaborated with operations teams and external custodians to reconcile margin calls and collateral allocations, reinforcing control processes and reducing settlement risk.
- Maintained alignment between trading and back-office systems, safeguarding portfolio risk metrics and accuracy across global trading books.
- Proactively identified and resolved trade booking exceptions, achieving a 98% reduction in daily discrepancies and ensuring timely settlement of multi-leg derivative transactions.
- Oversaw end-to-end trade lifecycle for credit derivative securities across Americas, EMEA, and APAC markets, enforcing compliance with internal controls and global regulations.

Wells Fargo Corporate Investment Bank, *Collateral Management Analyst*, Charlotte, NC June 2022-Aug 2022

- Investigated and resolved collateral trade breaks, payment anomalies, and margin call disputes, preserving portfolio integrity and mitigating financial risk.
- Redesigned quality control procedures for collateralized securities processing, decreasing reconciliation backlog and improving accuracy of margin calculations.
- Partnered with cross-functional teams to refine reconciliation processes, accelerating resolution of unsettled trades and enhancing operational efficiency.
- Ensured accurate settlement of collateral transactions by monitoring custodian reports and facilitating timely resolution of account breaks.

PIMCO, *Legal & Compliance Business Analyst, Insider Trading*, Newport Beach, CA June 2021-Aug 2021

- Led GIPS compliance audits for multi-million-dollar investment portfolios, identifying control gaps and ensuring adherence to global performance reporting standards.
- Developed interactive dashboards and reports to track regulatory metrics, enabling senior leaders to make informed decisions on investment strategy.
- Prepared comprehensive SEC and internal audit reports to validate compliance of investment data and trading activities.
- Collaborated with portfolio and legal teams to interpret new regulatory requirements, integrating guidelines into operational policies.

BMO Harris Bank NA, *Treasury and Payment Solutions Associate*, Chicago, IL June 2020-Aug 2020

- Conducted market and economic analyses to support corporate treasury investment and liquidity management strategies.
- Developed financial models to project cash flows and assess the impact of global interest rate changes on treasury portfolios.
- Assisted in reconciliation of treasury accounts and facilitated payment operations, ensuring compliance with financial controls.

BMO Capital Markets, *Global Trade Business Analyst*, Chicago, IL

June 2019-Aug 2019

- Performed Bloomberg Terminal research to support trading desk strategies and client presentations in fixed-income and equity markets.
- Developed and presented data-driven client engagement tools, adopted by senior management to strengthen capital markets relationships.
- Assisted with trade operations support tasks, including transaction entry and reconciliation of daily trade blotters.

EDUCATION

Morehouse College, Atlanta, GA – B.A. in Economics & International Communications
