



Julia Smith is a co-founder of Alpha Insights in Toronto. She has over 15 years of strategy and change management consulting, executive coaching and facilitation experience in the Financial Services industry.

Leverages very strong communication and planning skills to drive change, business transformation, and execution excellence.

A strategic, creative thinker with expertise in helping shape and deliver complex technology, operations and business transformations, supplier partnerships, and process improvement initiatives that improve client experience, market share and operating leverage.

Has a proven track record of achieving a high level of influence across organizations and with executives. Enjoys a strong reputation for effective client relationships, and is repeatedly “asked back” for subsequent engagements.

Career:

- Co-Founder, Alpha Insights
- Contract Strategy Consultant:
 - Clients included RBC, UBS, and Toronto Financial Services Association
- Citigroup - SVP, Transformation Leader
- RBC - Head, Strategic Planning, Global Tech and Ops
- Accenture – Senior Manager, Strategy and Change Management:
 - CIBC, Bank of America, TD, BMO, RBC, Freddie Mac, Fidelity Investments, AT&T

Education:

- Management of Enterprise Data Analytics, U of Toronto
- M.B.A. Schulich School of Business, York University
- B.A. University of Waterloo

Representative Accomplishments:

- Developed white papers on a number of Big Data related topics including “Planning for a Big Data Implementation”, “Selecting Data Visualization software,” and “Privacy issues in Big Data.”
- Led a 5 – 10 year future Strategic Technology Planning exercise for a CIO and his executive team.
- Drove the launch and analysis for a potential restructuring and outsourcing of in-house IT and operations groups for a COO and her team.
- Developed industry thought leadership documents on a wide range of topics including an assessment of Pooled Pension Retirement Funds on Toronto and the impact of a TMX/LSE merger on Toronto labour markets.
- Led a 90 day current state assessment of back-office capabilities and client channels for a COO and team.
- Facilitated and revised multiple yearly IT planning processes
- Defined scope, processes and tools, to drive improved controls on enterprise wide consulting spending.
- Developed a Business Process Outsourcing Strategy and proposal for a Bank Board which the CEO as the best written document of the year.
- Developed and facilitated process to identify three year cost saving strategies for each of Applications, Infrastructure, Retail and Wholesale Operations and Payments and Trade
- Designed and led a re-engineering program for shared services outsourcing venture.
- Designed, developed, and rolled out an integrated measurement structure that delivers a unique view of the end-to-end client experience.