

SHASHANK RAJ

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SUMMARY

Management Consultant in KPMG Canada's Finance practice with 8+ years across consulting and industry, advising CFOs and their teams on finance transformation – Target Operating Model design across people, process, technology, data, and governance, with delivery across FP&A, Chart of Accounts, GL, AP/AR, R2R, S2P, and ERP-enabled transformation. Background in insurance and financial services technology, leading multi-vendor programmes (40+ stakeholders) that cut processing time by up to 90% and generated \$2.3M in incremental revenue.

EXPERIENCE

Manager – Management Consulting, Finance
KPMG Canada

Jul 2026 – Present
Toronto, Canada

- Advise CFOs and senior finance stakeholders from diagnosis through delivery, designing future-state finance **Target Operating Models (TOM)** across people, process, technology, data, and governance, and building roadmaps toward a more efficient, insight-driven finance organization.
- Strengthen **FP&A** capabilities across planning, budgeting, forecasting, and analytics, and design standardized **Chart of Accounts** structures that enable consistent management and financial reporting.
- Optimize the **Record to Report (R2R)** and **Source to Pay (S2P)** cycles for speed, accuracy, control, and compliance, improving controls across GL, AP, and AR, and advise on **ERP-enabled transformation** as an enabler of the operating model.

Senior Manager – Insurance Transformation
LTI Mindtree

Jul 2023 – Jul 2026
Toronto, Canada

Client: Starr Insurance Companies

Project 1: Policy Booking & Reporting Platform

- Owned full lifecycle of a global multinational policy booking and reporting platform, integrating Salesforce CRM and PAS systems across APAC, LATAM, and North America – each with distinct paper company, currency, and regulatory requirements; **reduced processing time by 90%, saving \$500K annually**.
- Designed SOV location data ingestion feeding **CAT modelling via Moody's Underwrite IQ** (PML/EML curves, AAL, aggregate exposure), with Pitney Bowes address validation and geocoding of insured locations.
- Delivered end-to-end **reinsurance cession workflows** – Treaty (Quota Share, Surplus, per-risk and per-occurrence XoL with reinstatement premium) and Facultative – with sliding scale and profit commission, RiPro bordereau generation, and coinsurance premium apportionment.

Project 2: Underwriting Workbench (UWB)

- Product Owner for an enterprise UWB integrating three PAS systems – Insurity (Commercial Auto), DXC (Workers' Compensation), Sapiens IDIT (General Liability) – delivering unified Rate-Quote-Bind-Issue (RQBI), SmartComm binder and quote letters, and Salesforce CRM integration.
- Championed Gen-AI integration into submission triage and risk scoring, **increasing conversion rates by 45% and generating \$2.3M incremental revenue**.
- Ran a 40+ stakeholder programme across 3 vendors and a 2,000+ item backlog at **95% sprint predictability**, leading REST API contracts and joint SIT/UAT with each vendor (92% first-pass).
- Built a tiered referral and authority workflow engine and automated tax, fees, surcharge, and invoicing workflows; defined release strategy and go-live readiness and trained **500+ underwriting users**.

Senior Specialist → Senior Manager
LTIMindtree

Dec 2021 – Jul 2023
Bangalore, India

Client: TRUE Insurance – Homeowners Policy Administration & Document Management System

- Led product ownership of a greenfield Homeowners PAS and DMS covering the full policy lifecycle, a multi-variable rating engine designed with actuarial teams, DocuSign and SmartComm integration, and RBAC-based document routing.
- Delivered the platform to **500+ users at 98% satisfaction** and supported pre-sales efforts contributing to a **\$3.5M deal win**.
- Senior Business Analyst and Insurance SME across BFSI engagements; led the Unqork Centre of Excellence and won clients through RFP and RFI responses.

Associate Consultant
KPMG Global Services

Jun 2021 – Dec 2021
Bangalore, India

Client: Fortune 50 Financial Services Company – Alternate Investments & Asset Management Platform

- Delivered gap analysis and integration requirements for Broadridge's Alternate Investments platform (\$50M+ AUM), **improving fund reconciliation processing time by 70%**.

Associate Consultant
Virtusa

Oct 2020 – Jun 2021
Hyderabad, India

Client: Aon – Insurance Operations & Incident Management Platform

- Delivered a custom insurance operations and incident management platform on no-code/low-code, **improving operational efficiency by 125%** and cutting development effort by 50%.

Assistant System Engineer → System Engineer
Tata Consultancy Services

Dec 2016 – Mar 2019
Bangalore, India

Client: Qualcomm – Enterprise Search & IT Asset Management Platform

- Built an enterprise search solution on Apache Solr across SharePoint, databases, and file stores, **reducing query response time by 90%**, and an integrated IT asset management platform.

EDUCATION

Post Graduate Program in Management (PGPM), Great Lakes Institute of Management, Gurgaon 2019 – 2020

Bachelor of Engineering (Computer Science), Visvesvaraya Technological University 2012 – 2016

SKILLS & CERTIFICATIONS

Finance: TOM · FP&A · Chart of Accounts · R2R · S2P · GL/AP/AR · Financial Reporting · Finance Controls · ERP Transformation

Delivery: Product Ownership · Stakeholder Management · Requirements · Change Management · Pre-Sales · Agile/Scrum/SAFe

Insurance: Commercial Auto · Workers' Comp · GL · Homeowners · Reinsurance · Coinsurance · CAT Modelling · Rating & Pricing

Platforms & Tools: Insurity · DXC · Sapiens IDIT · Guidewire · Duck Creek · Salesforce · SmartComm · SQL · Power BI · JIRA

Certifications: CBAP (IIBA) · CSPO and CSM (Scrum Alliance) · Google Project Management · AWS Business Professional