

# Jan L. Copher, PMP

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## Lead Portfolio/Program Manager

FINANCE / BANKING / DEFENSE

- 15+ Years Program Management experience in defense, banking, finance and software development.
- Led formation of EPMO for \$2.6 billion merger and acquisition divestitures.
- Led a team of 90 personnel in a 5-Year Strategic Vision for the Pacific; adopted by US Pacific Command.
- Significant experience in Anti-Money Laundering, financial products and regulatory compliance.
- Lead and mentor Project and Program Managers and manage multi-million-dollar programs.
- Agile Portfolio Manager for Bank Payments organization's products and services.

### Career Competencies

SAFe Agile, PMBOK

C-Suite Communications

Portfolio/Program management

Strategic planning

Regulatory Compliance

Anti-Money Laundering (AML)

Change/Risk management

Cross-functional teaming

Problem Resolution

Product Management

Business Analysis

Mentoring/Coaching

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## PROFESSIONAL EXPERIENCE

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### Lead Portfolio / Program / Manager

USAA, Bank/Enterprise Project Management Office (EPMO) – Texas / Kentucky, 2016-June 2021

*Diversified Fortune 500 financial services company offering banking, finance, and insurance to 12.6 million members*

#### Agile Portfolio Manager for Bank Payments Programs

- Developed bank payments portfolio strategy. Reorganized/restructured payments organization to incorporate money movement with payments products and experiences (Wires, Bill Pay, Zelle, Funds Transfers, others).
- Ensure payments portfolio allocates budget and team capacity on priorities that keeps the bank customer focused, compliant and competitive in the financial market.
- Led effort to align program management tools with EPMO standards for more accurate/effective reporting.
- Decreased compliance risks to payments experiences by ensuring Payments Strategy/Governance were aligned with Bank strategic priorities and our Portfolio backlog was ready for program execution.

#### Bank AML Program

- Program lead, overseeing planning, executing, and product development reporting status (via Rally/JIRA) of work across Bank product lines, implementing the Bank Secrecy Act standards.
- Identified/replaced high risk manual processes with automation; streamlined controls and processes across the product lines.

#### Mergers and Acquisitions Divestitures

- Set up and led EPMO for two merger and acquisition divestitures totaling \$2.6 billion.
- Created Business Case and communicated risks, program status and recommended courses of action to Bank and Enterprise executives to keep the bank on schedule.
- Impact: Coached executives on which actions to take to meet aggressive divestiture closing timelines.

#### Enterprise Anti-Money Laundering (AML) Know Your Customer (KYC) Program

- Drove business and software deliverables to comply with Customer Due Diligence regulatory requirements.
- Coordinated program actions with multiple organizations and portfolios across the Enterprise.
- Communicated dependencies and risks that impacted deliverables and program timeline.
- Impact: Met federal regulatory requirements on schedule for the cyber security KYC program.

#### Financial Crimes, Multi-Factor Authentication

- Agile Release Train Engineer: synchronized efforts/communications across multiple business/IT work streams; updated product roadmap. Anticipated and resolved impediments to deliverables and areas of risk.
- Guided procedure change adoption across Enterprise organizations. Resulted in immediate decrease in fraud and identity theft against our customers after program execution.

### Director of Business Development

Igocki LLC– San Antonio, TX 2016

*Software development for business and healthcare apps*

- Consulted CEO of start-up software engineering company with product case studies, project planning, client relations, logistics, operations, P&L risks and organizational structure.

- Conducted initial Business Case study for a medical communications technology application, defined scope of the project. Identified users of the technologies and potential clients.
- Developed client relationships, proposed business contracts and provided technology advice.
- Used Agile and other methodologies; ensured project scopes and deliverables were defined and clear.

**Consultant / Project Manager**

Clients: TRM Engineers &amp; Igocki LLC – San Antonio, TX 2013-2016

- Advised small business owners on growth opportunities. Recommended improvements for efficient business practices, customer relations and organizational structure; kept projects on-schedule, within budget/in scope.

**Program Manager / Senior Analyst**

Booz Allen Hamilton – Multiple locations 2009-2013

*Federal defense contractor*

- **Geospatial Intelligence (GEOINT) Functional Solution Analysis (FSA):** Organized, compiled, and analyzed results of 27 potential industry solutions, leading client to an optimal sensor solution.
- **Coaching Analysts:** Determined team direction for in-depth social network analysis products with rapid changes in priorities. Mentored and coached members of the team, empowering them to make decisions and lead their own teams. Quality, timeliness and client satisfaction improved, along with confidence and morale.
- **Anti-Money Laundering:** Collaborated with 2 major international partners, federal law enforcement and the Department of the Treasury to help dismantle a complex network of financiers funding illegal activities.
- **MQ-X UAS Vehicle Survivability:** Developed facts/assumptions and coordinated the development of methodologies including modeling and simulation, design of experiment, aircraft design, and cost analysis. This analysis drove aircraft design and cost models to improve system survivability and cost.

**Lead Program Manager / Director of Strategic Plans / Lead Analyst**

Lieutenant Colonel, United States Air Force – Multiple worldwide locations 1988-2009

- **Strategic Analysis for DoD:** Conducted and managed 25 strategic analysis projects and presented over 40 briefings to 700+ foreign and US officials; used by executive leaders to advise the Secretary of Defense, Congress and the White House.
- **National Security:** Managed over \$321 million in Department of Defense program funds to address critical US national security capability gaps.
- **US Pacific Command:** Led 90-person team that planned and coordinated strategic goals and logistics for the Pacific Strategic Summit. The resulting 5-Year Strategic Vision for the Pacific was adopted, impacting assets and plans for 36 nations, encompassing covering 50% of the world's population.
- **Pentagon's Product Policy:** As PM Co-chair, streamlined standards and transformed end-to-end processes for Defense program. Reduced production schedule by 2 months, cut duplication of effort and re-balanced workload among national and international organizations.

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**TOOLS & TECHNOLOGY**

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JIRA Rally Microsoft Project PMBOK Aha! Asana SAFe Agile

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**EDUCATION**

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**Master of Business Administration**, Wayland Baptist University, San Antonio, TX  
**Master of Science**, International Relations, Troy State University, Troy, AL  
**Bachelor of Arts**, Russian Area Studies, University of Kentucky, Lexington, KY  
**Joint Forces & Air Force Staff Colleges**, Norfolk VA and Washington DC

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**CERTIFICATIONS**

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**Project Management Professional (PMP)**, Project Management Institute  
**Certified Project Manager (CPM)**, Project Management Leadership Group, LLC  
**SAFe 4.0 for Teams** – Agile Principles, Methodologies, and Mindset  
**Leading SAFe** with SAFe Agilist Certification  
**Yellow Belt** – Lean Six Sigma  
**Fundamentals of Systems Acquisition Management**, Defense Acquisition University