



S&OR Personas

	Translator	Innovator	Entrepreneur	Examiner	Financial Wizard
Overview	<p>The Translator plays the critical role of translating technical risks into business risks. They bridge the gap between Finance and IT and are known for being:</p> <ul style="list-style-type: none"> • Detail Oriented • Critical Thinkers • Methodical • Analytical 	<p>The Innovator uses their deep passion for coding, AI, RPA, analytics and machine learning to help our clients transform their businesses and develop solutions. They are known for being:</p> <ul style="list-style-type: none"> • Deep Subject Matter Experts • Creative • Methodical • Agile 	<p>The Entrepreneur uses their business savvy and communication skills to help businesses <i>be better</i>. They are known for being:</p> <ul style="list-style-type: none"> • Entrepreneurial • Critical Thinkers • Influential • Strong Communicators 	<p>The Examiner uses their attention to detail and judgement to help clients identify opportunities for process and control enhancement, helping clients meet their operational, compliance and regulatory objectives. They are known for their:</p> <ul style="list-style-type: none"> • Professional judgement • Communication skills • Detail Orientation • Critical Thinking 	<p>The Financial Wizard uses their deep knowledge of finance to help our clients understand and manage risks associated with strategic initiatives and financial transactions. They are known for:</p> <ul style="list-style-type: none"> • Deep Subject Matter Expertise • Critical Thinking • Methodical approaches • Professional judgement
Knowledge/Skills /interests	<ul style="list-style-type: none"> • IT acumen (Operating systems/ databases / applications) • Computer operations • IT audit • IT security 	<ul style="list-style-type: none"> • Coding background/exposure • IT acumen (Operating systems/ databases / applications) • Artificial Intelligence and Machine Learning • Analytics and data visualization 	<ul style="list-style-type: none"> • Business acumen • Facilitation • Data analysis • Data visualization 	<ul style="list-style-type: none"> • Business acumen • Risk and controls • Audit methodologies • Analytics and data visualization 	<ul style="list-style-type: none"> • Finance acumen • Data analysis • Financial analysis • Financial modelling / forecasting
Programs	<ul style="list-style-type: none"> • Information Systems • Business Administration / Commerce • Computer Science • Accounting 	<ul style="list-style-type: none"> • Computer Science • Engineering • Mathematics • Amateur developer 	<ul style="list-style-type: none"> • Business administration / Commerce • Engineering • Economics 	<ul style="list-style-type: none"> • Business Administration / Commerce • Accounting 	<ul style="list-style-type: none"> • Business Administration / Commerce • Economics • Finance
Designation Opportunities *	<ul style="list-style-type: none"> • Certified Information Systems Auditor (CISA) • Chartered Professional Accountant (CPA) 	<ul style="list-style-type: none"> • Various platform certifications 	<ul style="list-style-type: none"> • Chartered Professional Accountant (CPA) • Project Management Professional (PMP) 	<ul style="list-style-type: none"> • Chartered Professional Accountant (CPA) • Certified Internal Auditor (CIA) 	<ul style="list-style-type: none"> • Chartered Financial Analyst (CFA) • Certified Valuation Analyst (CVA) • Financial Risk Management (FRM)
<p>***** Note that the identified designations are not mandatory, they have been included to illustrate the designations that candidates are able to pursue if desired. *****</p>					
Key Roles & Tasks	<ul style="list-style-type: none"> • Apply technical knowledge to critically assess client IT control environments • Conduct IT control testing to address critical financial reporting, compliance and operational risks • Critically analyze evidence and identify opportunities for IT control improvement 	<ul style="list-style-type: none"> • Develop solutions and solve problems using design thinking • Create dynamic analytics environments by effectively integrating processes, people and technology • Work with clients and partnered vendors to implement solutions to track critical business and regulatory information 	<ul style="list-style-type: none"> • Facilitate workshops/interviews with clients to obtain understanding of current and future state of capabilities • Conduct benchmarking • Conduct gap assessments to identify enhancements to policies, procedures, processes and/or controls • Develop roadmaps to address gaps and prioritize recommendations 	<ul style="list-style-type: none"> • Perform interviews with client stakeholders to understand current business processes • Evaluate design and test operating effectiveness of business and IT controls • Facilitate client interaction, data collection and validation • Critically analyze evidence and identify opportunities for process and control improvement • Communicate findings and recommendations 	<ul style="list-style-type: none"> • Prepare and perform forecasting analysis, impact assessments and scenario analysis • Develop working sheets, presentations and reports • Conduct research on clients, industry and regulations