

BUSINESS OPERATIONS · DECISION SYSTEMS · EXECUTION

An operator who turns ambiguous, under-governed business problems into clear decisions and repeatable systems.

Fourteen years across operations, markets, treasury, risk, and portfolio management, using analytics, process design, governance, and automation to make complex work clearer and more executable.

I have worked across banking operations, markets, treasury, risk, and portfolio management for 14 years. I started in FX settlement, where I managed approximately 25 staff, and later led a six-person equity-derivatives product-control team before moving into liquidity, market risk, and Business Banking portfolio analytics.

At KeyBank, my current work includes a risk-scoring dashboard in UAT, credit-line risk-rating automation and governance, and early-stage revolving-line-to-term work. I fully automated a manual, Excel-based Regulation B process handling hundreds of applications a day, and I operate an existing exposure model whose signals have identified roughly \$55M, with roughly \$3M recovered.

At Citi, I identified and drove a SWIFT migration that delivered approximately \$29M in annual savings. During the 2023 regional-banking crisis, I was a core contributor to a team that optimized roughly \$10B of the balance sheet so roughly \$5B could remain within Citi's US entities.

I tend to work on problems that need both analysis and implementation. I clarify the business decision, understand how the work and data move, and help define the procedures, controls, ownership, and monitoring around the answer.

I have already been doing core pieces of Director-scope work: coordinating across functions without relying on formal authority, designing decisions and controls together, and turning ambiguity into an executable, governed process.

I am interested in Director-level roles across business analytics, strategy, business operations, portfolio management, transformation, Chief of Staff work, and product or commercial leadership. Banking is where I built this pattern; the skill set travels wherever complex organizations need clearer decisions and repeatable systems.

Robert Perry Morris

Vice President, Business Banking Portfolio Analytics · Portfolio Management & Risk Strategy | Business Banking

Vice President, Business Banking Portfolio Analytics

Fourteen years of progression from people leadership close to the transaction through markets and treasury to portfolio strategy, governance, and cross-functional implementation.

CAPABILITIES

Decision Systems

Decision Framing, Portfolio & Risk Analytics, Performance Signals, Scenario Analysis

Governance & Execution

Operating Model Design, Control Design, Procedures & Monitoring, Cross-Functional Implementation

Process & Automation

Workflow Redesign, Python & SQL Automation, BI & Reporting Systems, Regulated Process Execution

Leadership & Translation

Lean-Team Leadership, Stakeholder Alignment, Knowledge Transfer, Executive Communication

EXPERIENCE

2025 - Present



Vice President, Business Banking Portfolio Analytics

Portfolio Management & Risk Strategy | Business Banking

KeyBank

- Built a portfolio risk-scoring dashboard, now in UAT, designed to inform relationship-manager compensation decisions within a governed review process.
- Designed automation and governance for freezing or downgrading risk ratings on credit cards and revolving lines as relationships evolve.
- Fully automated a manual, Excel-based Regulation B adverse-action process handling hundreds of applications a day; risk partners monitor the output.

2024



VP, Non-Trading Market Risk Solutions

Citibank

Worked in a Chief of Staff capacity across Treasury, Finance, Risk, and Technology. Developed the Treasury Management Notebook and automated cash-rebalancing workflows.

2021 - 2024



VP, Liquidity Management

Citibank

Core contributor to a team that optimized roughly \$10B during the 2023 regional-banking crisis, enabling roughly \$5B to remain within Citi's US entities.

2019 - 2021



AVP, Equity Derivatives Product Control

Citibank

Held daily P&L and product-control responsibility for index and sector derivatives, led a six-person team, and built Power BI and KNIME reporting.

2012 - 2019



AVP, Foreign Exchange Trade Processing

Citibank

Led approximately 25 staff across global FX settlement and drove a direct SWIFT migration that delivered approximately \$29M in annual savings.

LEADERSHIP

Lean Technical Modernization

Developing a long-tenured direct report with deep institutional data knowledge as they work on a legacy-system migration to GCP and legacy-product automation, pairing modernization with durable knowledge transfer in a small, high-leverage team.

Citi Buffalo Pride

Co-founded and grew Citi Buffalo's Pride employee network to more than 300 active members.

Training & Enablement

Designed and facilitated 25+ cross-functional workshops across Citi Buffalo, translating technical and operational topics into practical tools teams could use.