

FROILAN V. PEREZ JR.

Operations Manager | Strategy & Change | Process Re-engineering
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PROFESSIONAL SUMMARY

Operations Manager with 11 years within HSBC's Markets and Security Services operations — cutting incidents by 46%, saving 44+ manual work hours a month, and leading zero-incident migrations across Global Custody, Debt Securities, and FX. Promoted four times within one institution. Named a top performer in 2024. Lean Six Sigma certified. Known for building KPI/KRI governance frameworks that standardized process beyond the original team, running dual mandates without dropping either ball, or translating complex operational risk into clear executive reporting.

IMPACT AT A GLANCE

- **46% reduction** in operational incidents — achieved through workflow redesign and messaging process improvements.
- **44+ hrs/month saved** via process re-engineering initiatives — capacity returned directly to front-line operations.
- **15 branches migrated** to Manila — 11 EMEA (FX Settlements) and 4 MENA (Debt Securities) — with zero critical incidents and full business partner continuity maintained throughout
- **4x promoted** in 11 years at HSBC — from Global Support Executive to Operations Manager
- **BCP POC** designated point of contact for Business Continuity Planning across Global Custody, Debt Securities, and Global FX — consistently led Business Impact Analysis (BIA) review and documentation for each respective team throughout tenure.
- **Multi-team** governance and reporting frameworks designed and adopted beyond the originating team.

CORE SKILLS

- **Governance & Risk:** KPI/KRI Governance & Reporting · Operational Risk & Controls · RCSA · Control Self-Assessment · Regulatory Reporting · Audit & Compliance Support · AML/KYC Awareness
- **Process & Quality:** Process Re-engineering & Workflow Optimization · Lean / Six Sigma (Yellow Belt) · Root Cause Analysis · Value Stream Mapping · DMAIC · PDCA · BPM · SOP Creation, Review & Compliance
- **Operations Domain:** Global Custody Settlements · Debt Securities Operations · FX Confirmations & Settlements · SWIFT MT/MX · Failed Trade Investigation · Cash & Stock Reconciliation · Collateral Awareness · Corporate Actions Awareness · HR/Recruitment Operations
- **Project & Change:** Stakeholder & Executive Reporting · Migration & Transformation Management · Change Impact Assessment · Business Continuity Awareness · RACI · Project Coordination · Vendor Management Awareness
- **People & Leadership:** People Management & Coaching · Talent Development · Performance Management · Cross-functional Team Leadership · Span-of-Control Management · Succession Planning · Team Capacity Planning & Headcount Optimization
- **Technology:** Microsoft Excel (Advanced/VBA) · Microsoft Word · Microsoft Outlook · Microsoft Visio · Zoom · Agile Project Tracking (Jira-based) · Internal banking platforms: trade capture & settlements, reconciliation, project management, LMS, and learning & development systems (undisclosed per institutional policy)
- **Team & Operational Administration:** Performance Tracking & Management · Client & Counterparty Static Data Oversight · Workforce Administration (attendance, leave & payroll) · Client & Business Partner Relationship Management · Rewards, Recognition & Team Engagement Administration · Client & Counterparty Static Data Oversight · HR/Recruitment Pipeline Administration · Project Management

PROFESSIONAL EXPERIENCE

HSBC Electronic Data Processing Philippines Inc.

Manager, Operations | Strategy & Change – Process Re-engineering (Remote) May 2025 – Feb 2026

- Appointed to a dual mandate: retained people management of the Global Custody Settlements team (3 Assistant Managers, 1 Associate) while simultaneously taking on a Strategy & Change brief across Markets & Securities Services — a recognition of cross-functional capability.
- Led end-to-end process improvement and operational transformation initiatives across Markets & Securities Services, aligned to the division's target operating model (TOM) and digital transformation roadmap.
- Coordinated project implementation, stakeholder management, value stream mapping, QA/testing support, migration activities, and project governance across regional teams.
- Designed and produced executive governance reports, KPI/KRI dashboards, and operational risk summaries — including RCSA inputs and control self-assessment outputs — for senior management and internal auditors.
- Partnered with Operations, IT, Compliance, and business stakeholders on cross-border operational enhancement projects, ensuring regulatory reporting alignment and change impact assessment across all workstreams.

Manager, Operations | Global Custody Settlements (Remote) Jul 2024 – May 2025

- Managed operational oversight, escalation management, SLA monitoring, SOP creation/approval, and stakeholder coordination for global custody settlement processes across multiple markets.
- Served as department SME for failed trades investigation, stock reconciliation (Trade-Trust account), and cash reconciliation (Statement-Ledger) — performing root cause analysis and implementing corrective controls.
- Led process standardization and operational efficiency initiatives across regional custody teams, applying Lean principles and PDCA cycles to reduce error rates and manual effort.
- Drove talent development through structured coaching, performance improvement planning, and succession planning conversations within a cross-functional team environment that resulted to two direct report promotions in 2025.

Manager, Operations | Debt Securities Operations (Hybrid) Aug 2022 – Jul 2024

- Oversaw operational support, reconciliation, regulatory reporting inputs, and risk controls for debt securities operations, maintaining zero critical incidents across migration and transformation projects.
- Led SOP revisions and BPM documentation for migration and transformation workstreams, ensuring compliance alignment and audit-readiness.
- Managed operational reporting, escalations, and compliance coordination — delivering KPI/KRI dashboards and control self-assessment outputs to senior stakeholders.

Assistant Manager, Operations | Global Custody Settlements Sep 2017 – Aug 2022

- Managed failed trade resolution, stock and cash reconciliations, SLA monitoring, operational reporting, and stakeholder coordination across global custody settlement workflows.
- Served as SME for securities settlements, SWIFT MT/MX processes, and operational training — supporting onboarding, knowledge transfer, and process documentation initiatives.
- Supported change impact assessments and operational readiness activities for transformation projects, contributing to zero-defect migration outcomes.

Assistant Manager, Operations | Global Foreign Exchange May 2017 – Sep 2017

- Supported FX confirmations, settlements, reconciliations, and operational readiness activities for a newly established operational entity.
- Assisted in training delivery and process transition documentation, ensuring knowledge continuity during onboarding of new team members.

Global Support Executive | Global Foreign Exchange Dec 2014 – May 2017

- Supported FX operations including confirmations, settlements, reconciliations, and operational controls in a high-volume, time-critical environment.
- Recognized for performance excellence, training contributions, and consistent service quality delivery across KPI and SLA metrics.

Volenday Inc. (HSBC Recruitment Team)

HR & Recruitment Executive

Apr 2014 – Oct 2014

- Coordinated end-to-end recruitment administration from candidate screening to onboarding, including initial behavioral interviews and assessments for managerial-level candidates.
- Prepared employment contracts, processed salary computations, and maintained recruitment trackers and onboarding documentation.

NCO Philippines (Alorica) / IBM Daksh (Concentrix)

Customer Support | Telecommunications & Credit Card Services

2012 – 2014

- Delivered customer and administrative support in high-volume call centre environments, maintaining accuracy and professionalism across KPI-driven service targets.
- Supported quality reviews, documentation, and operational coordination activities.

CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

- HSBC Lean Six Sigma Yellow Belt — Lean process methodology, DMAIC, root cause analysis, and value stream mapping.
- HSBC Certified Process & Asset Class Trainer (TRANSFORM) — Operations training design and delivery
- Workplace Engagement, Leadership Development & Organizational Effectiveness — Salt & Light Ventures

EDUCATION & PROFESSIONAL FOUNDATION

New Era High School — Quezon City, Philippines

11 years of continuous progression within HSBC — one of the world's largest global banking institutions — across six roles, four promotions, and three asset classes. Formal development supplemented by HSBC-certified Lean Six Sigma training, process and asset class trainer accreditation, and leadership development programmes. The depth and continuity of this institutional history serve as the practical equivalent of — and in cases exceeds the operational relevance of — a formal tertiary qualification in this field.