

MICHAEL C. ZUPA

ENTERPRISE TRANSFORMATION EXECUTIVE & MANAGEMENT CONSULTANT

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EXECUTIVE PROFILE

Transformation executive and management consultant with 15+ years leading high-stakes finance, risk, operations, and technology-enabled change across global financial services, insurance, and advisory environments. Specializes in turning ambiguous enterprise priorities into executable operating models, PMO governance, roadmaps, controls, and measurable outcomes. CFO/COO/CAO-facing leader across finance modernization, shared services, regulatory remediation, SAP and Workday programs, process redesign, and enterprise performance management; now extending that discipline into AI, GenAI, intelligent automation, and AI-enabled operating-model transformation.

SELECTED ENTERPRISE IMPACT

\$6T TOPSIDE ADJUSTMENTS REDUCED	~99% REGULATORY EDIT-CHECK PASS RATE	80+ COUNTRIES IN SAP GL ROLLOUT
\$15M ANNUAL LEAN/SIX SIGMA SAVINGS	40% REPORTING CYCLE-TIME REDUCTION	\$8M ANNUALIZED RUN-RATE EXPENSE SAVINGS

CORE ADVISORY CAPABILITIES

Finance Transformation & CFO/COO Advisory • Enterprise PMO / TMO & Program Governance • Operating Model Design & Shared Services • Strategic Risk, Controls & Regulatory Remediation • Process Optimization / Lean Six Sigma • ERP & Finance Systems Integration • AI, GenAI & Intelligent Automation Strategy • Executive Reporting, KPIs / OKRs & Benefits Realization • Change, Adoption & Stakeholder Alignment

PROFESSIONAL EXPERIENCE

ZMC - Zupa Management Consulting | New Jersey / New York Metro | January 2025 - Present

Founder & CEO

- Founded and lead an executive-level consulting practice helping complex organizations translate transformation priorities into practical operating models, governance, roadmaps, and measurable execution.
- Advise finance, operations, risk, and technology leaders across six service areas: Finance Transformation, Process Optimization, Operational Excellence, Strategic Risk Management, Technology Integration, and AI, GenAI & Intelligent Automation.
- Structure transformation governance, executive reporting, KPI/OKR frameworks, process redesign, benefits tracking, and change/adoption approaches that strengthen accountability, prioritization, and decision-making.
- Expanded ZMC's advisory portfolio to AI-enabled operating-model transformation, including AI opportunity assessment, use-case prioritization, responsible-AI governance, human oversight, intelligent-automation roadmaps, and benefits-realization planning.

Acrisure | New Jersey | July 2025 - March 2026

Senior Program Manager - Finance Transformation

- Led enterprise program management for the launch of a shared services office in Gdansk, Poland, transitioning U.S.-based accounting reconciliation operations to a lower-cost offshore model.
- Directed cross-functional execution across HR, Change Management, Technology, Real Estate, Procurement, Treasury, Legal, Workday HCM, Workday Financials, Accounting, and Reporting; integrated milestones and managed dependencies.
- Established weekly workstream reviews and monthly Steering Committee governance with senior leadership, including the CAO and CFO, improving visibility, escalation, prioritization, and decision discipline.
- Designed and scaled a centralized PMO model and core governance toolkit - RAID logs, risk registers, RACI matrices, and executive reporting - to strengthen portfolio control and accountability.
- Advised leadership on operating-model design, organizational structure, financial performance, and execution discipline in an environment shaped by rapid growth and M&A complexity.

Citi Group | New York, NY | January 2022 - June 2024

Senior Vice President - Finance Transformation

- Led COO/CFO-facing Finance transformation across a 1,100+ entity global organization, translating strategy into operating-model enhancements, OKRs, performance metrics, strategic plans, and executive decision support.
- Achieved a \$6T reduction in Topside Adjustments and improved regulatory edit checks to an approximately 99% pass rate.
- Managed a 20-member team to standardize Report Production Procedures, Process Flow Guidelines, and Report Workflow for Citigroup's BCBS 239 Key Reports.

Citi Group - continued

- Built governance, decision-rights, portfolio reporting, executive dashboards, and full-lifecycle delivery disciplines across Finance, HR, IT, Operations, and M&A integration, improving transparency and executive decision speed.
- Identified opportunities for process standardization, shared services, and operational efficiency while strengthening risk management, stakeholder alignment, and delivery visibility.

Dixon Hughes Goodman | New York, NY | July 2018 - January 2022

Program Manager - CFO & Business Advisory

- Led CFO and business-advisory programs spanning finance transformation, process re-engineering, regulatory remediation, business-strategy implementation, and technology adoption.
- Established Regulatory Change Management and Finance Change Management Forums; built governance structures, charters, roadmaps, roles, cadences, risk documentation, and audit-ready controls.
- Led Steering Committee discussions on LDTI with the CFO and senior Finance/IT leaders; optimized US GAAP, LDTI, and IFRS 17 reporting and automated reconciliations across premiums, reserves, and FX valuations, reducing reporting cycle time by 40% and improving account accuracy.
- Managed regulatory and compliance risks, remediation plans, and Internal Audit findings through resolution, maintaining stakeholder alignment with internal teams and external regulators.

AIG | New York, NY | October 2014 - June 2018

Program Manager - Manager, Enterprise Finance Transformation (EFT)

- Directed the rollout of SAP General Ledger across 80+ countries, establishing the GL as the single source of truth for US GAAP, local statutory, management reporting, and standardized global FX design.
- Integrated Ariba, Concur, SAP Fixed Assets, and Accounts Payable; migrated local GLs and legacy applications to SAP; partnered with Corporate IT and business sponsors on finance-system selection, decommissioning, and centralized support.
- Designed global business and finance processes, interim-state operating models, and target-state roadmaps connecting underwriting, business operations, technology, systems, and process requirements.
- Executed Lean/Six Sigma-driven optimization delivering \$15M in annual savings and an additional \$8M annualized run-rate expense reduction.
- Led finance-transformation risk and compliance initiatives, reducing compliance breaches by 25% and using root-cause analysis to strengthen governance and remediation.

QBE | New York, NY | April 2012 - October 2014

Tech Lead - Finance Transformation

- Supported a multi-wave Finance transformation, identifying opportunities to remove manual effort, improve use of existing systems, adopt new technologies, and strengthen communication across the organization.
- Led a four-person team supporting IT restructuring and offshoring that reduced department size by 65%; oversaw development and deployment of systems supporting large-scale organizational transformation.
- Established initiative-scoping and delivery standards, led enterprise process and financial-reporting improvements, and managed regulatory risk and cross-functional remediation.

E2E Advisors | New York, NY | January 2010 - March 2012

Senior Consultant - Financial Business Operations

- Advised on strategic operations, client-service enhancements, and business-growth strategies supporting QBE.
- Consulted on SAP migration strategy and led accounting-process re-engineering to automate workflows, reduce operational inefficiency, and enable cost-saving measures.
- Served as a Modeler / Architect supporting migration from PeopleSoft and Oracle legacy systems to SAP across specialty and middle-market accounting functions.

EDUCATION & CERTIFICATION

Richard Stockton University

Bachelor of Business Administration | May 2008

Certified ScrumMaster (CSM)

Agile / Scrum credential

TECHNOLOGY & METHODS

SAP S/4HANA, SAP General Ledger, Ariba, Concur, Workday Financials, Workday HCM, Oracle, PeopleSoft, SQL, Power BI, Tableau, Microsoft Project, Excel, PowerPoint, Visio, Access • Agile Scrum, Kanban, SDLC, GAAP, Financial Reporting, Process & Control Mapping, Business Analysis, Change Management, Financial Systems Architecture, Process Re-engineering, AI-enabled products