Omar Sherman

Director, Business Analysis

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STRENGTHS

Insurance domain depth
Wholesale workflows became easier for delivery teams after coaching covered submissions, referrals, endorsements, bordereaux, and claims handoffs.

Distributed team leadership
Managed analysts across locations and projects; regular coaching gave quieter contributors room to solve difficult problems well.

Requirements discipline
A shared review rhythm clarified business rules and acceptance criteria, and project teams began seeking guidance earlier.

Testing readiness
UAT scenarios, traceability, and defect triage made release conversations calmer and helped business testers focus on meaningful risks.

Executive partnership
Clear risk and capacity updates helped senior leaders make timely scope decisions without losing sight of business outcomes.

SKILLS

Business analysis leadership

P&C insurance

Wholesale insurance

Team management

Strategic thinking

Operational execution

SUMMARY

Director-level business analysis leader with 20 years of **post-graduate experience** across P&C and **wholesale insurance technology**. Leads distributed BA teams, builds practical operating models, and connects business priorities with software delivery. Work covers property, casualty, professional lines, transportation, workers' compensation, underwriting, brokerage, policy administration, claims, and distribution workflows. Established requirements, traceability, UAT, risk, resource planning, and retrospective standards across complex portfolios. Managed and mentored business analysts for more than 14 years through onboarding, career planning, project coaching, **performance conversations**, and shared learning. CBAP and CPCU credentials support strong insurance knowledge and SDLC fluency. Ready to help Meridian Specialty Markets align stakeholders, strengthen analysis quality, improve testing readiness, and turn strategic priorities into dependable business outcomes.

EXPERIENCE

Director, Business Analysis

Northstar Insurance Technology Partners | May 2021 - Present | Columbus, OH

Direct a distributed business analysis function supporting **policy administration**, broker portals, claims intake, and specialty underwriting initiatives across a 30-project P&C portfolio. Set team direction, coach analysts, allocate shared resources, and advise senior business and technology leaders on requirements quality, testing readiness, risk, and sequencing.

- Established portfolio BA checkpoints for discovery, traceability, UAT readiness, and retrospectives, improving executive risk visibility.
- Allocated 18 analysts across 30 projects using shared resource data, subject expertise, capacity, and release timing.
- Coached analysts through wholesale workflows covering submissions, referrals, endorsements, bordereaux, commissions, and claims handoffs.
- Created role-based onboarding and **growth plans** linking SDLC practices with guided insurance-domain learning for **early-career analysts**.
- Presented dependencies, testing readiness, portfolio **risks**, and resource forecasts, enabling timely scope and sequencing decisions.
- Partnered with PMO and **solution owners** on delivery priorities, stakeholder alignment, and **business** analysis standards across initiatives.

Senior Manager, Business Analysis

HarborPoint Risk Systems | June 2016 - April 2021 | Cincinnati, OH

Managed a distributed BA organization supporting commercial P&C platforms used by brokers, underwriters, and operations teams. Shaped requirements and UAT standards, coached analysts, assessed integration impacts, and translated specialty-product needs into delivery plans for product and engineering partners.

- Managed 11 **business** analysts and four contractors across concurrent commercial P&C platform initiatives.
- Built a requirements and UAT toolkit with process maps, rules, criteria, **traceability**, triage, and release signoff.
- Led broker submission modernization discovery, converting specialty workflows into prioritized epics and testable engineering capabilities.
- Instituted coaching reviews and retrospectives, strengthening **stakeholder engagement**, estimation discipline, and unresolved-risk escalation.
- Evaluated policy, billing, document, and rating integrations with **solution owners** before major platform releases.
- Developed capacity forecasts and hiring recommendations from resource data, supporting predictable analyst coverage during regulatory initiatives.

Analytic skills

Problem solving

Stakeholder relationships

Requirements gathering

UAT strategy

Insurance applications

SDLC knowledge

Resource allocation

Business outcomes

LANGUAGES

English — Native

Spanish — Intermediate

MY CAREER

- Director, Business Analysis at Northstar Insurance Technology Partners (5.3 Years)
- Senior Manager, Business Analysis at HarborPoint Risk Systems (4.8 Years)
- Business Analysis Manager at Lakeshore Underwriting Solutions (3.8 Years)
- Lead Business Analyst at Pioneer Specialty Services (2.8 Years)
- Business Analyst at Great Plains Risk Exchange (3 Years)

Business Analysis Manager

Lakeshore Underwriting Solutions | July 2012 - May 2016 | Indianapolis, IN

Led a six-person BA team delivering specialty insurance enhancements for workers’ compensation, transportation, and professional liability products. Guided discovery, process design, requirements approval, UAT, defect prioritization, and cross-functional decision making across underwriting and distribution operations.

- Led six analysts delivering workers’ compensation, **transportation**, and professional liability product enhancements.
- Standardized interviews, current-state analysis, future-state design, and requirements signoff for **underwriting** operations.
- Guided UAT planning and defect prioritization during a **policy administration** upgrade serving 40 locations.
- Coordinated **business**, **technology**, compliance, and operations workshops around rating, eligibility, workflow, and document decisions.
- Created an **insurance** knowledge base covering terminology, product rules, data definitions, and repeatable testing patterns.
- Escalated dependencies and release risks through steering meetings, helping leaders sequence work around renewal periods.

Lead Business Analyst

Pioneer Specialty Services | August 2009 - June 2012 | Louisville, KY

Served as lead analyst for commercial P&C initiatives spanning submissions, quote processing, policy issuance, endorsements, and broker communications. Connected underwriters, brokers, service teams, QA, developers, finance, and operations during iterative delivery and policy platform migration efforts.

- Translated underwriter and broker interviews into workflow diagrams, functional requirements, rules, and acceptance criteria.
- Designed UAT scenarios with representative account, coverage, and transaction data for policy platform releases.
- Facilitated workshops clarifying underwriting, finance, operations, and **technology** handoffs during policy migration.
- Maintained traceability from approved requirements through test evidence and release decisions for project sponsors.
- Mentored two associate analysts in elicitation, documentation, **insurance** vocabulary, and stakeholder follow-up.
- Coordinated defect review with QA, developers, and **business** testers, keeping release gaps visible.

Business Analyst

Great Plains Risk Exchange | July 2006 - July 2009 | Omaha, NE

Supported business analysis for policy administration and broker service applications used by commercial insurance operations. Documented processes, data, specifications, prototypes, acceptance criteria, testing evidence, and project decisions while working with underwriting, claims, PMO, QA, and application development teams.

- Documented current-state processes and data definitions through interviews with underwriting and **claims** teams.
- Produced functional specifications, screen prototypes, workflow diagrams, and acceptance criteria for account enhancements.
- Coordinated **business** testing cycles by preparing scenarios, recording defects, and confirming fixes with QA.
- Used **SQL** queries and spreadsheet reconciliations to investigate policy, customer, and transaction discrepancies.
- Maintained decision logs and requirements repositories, strengthening handoffs among stakeholders, PMO, and **technology** teams.
- Supported **policy administration** and broker service improvements, giving operations clearer workflows and dependable release information.

PROJECTS

Wholesale Submission Operating Model 2021

Created a practical operating model for wholesale submission analysis, connecting intake, discovery, requirements review, traceability, UAT readiness, risk review, and retrospectives across distributed delivery teams.

Commercial P&C UAT Toolkit 2020

Built reusable UAT artifacts for commercial insurance platforms, including process maps, business rules, acceptance criteria, traceability matrices, defect triage, and release signoff.

Policy Administration Upgrade 2016

Guided business testing for a policy administration upgrade serving 40 branch and partner locations, with focused scenarios, defect priorities, and release decisions.

LEADERSHIP & AWARDS

- Recognized as a trusted BA leader for creating portfolio standards that gave executives clearer delivery-risk visibility.
- Built a distributed analyst mentoring practice with onboarding plans, career development conversations, project coaching, and shared learning.
- Earned CBAP and CPCU credentials while advancing from business analyst roles into director-level insurance technology leadership.

EDUCATION

Bachelor of Science in Business Administration

University of Nebraska at Omaha GPA: 3.7 2006 Omaha, NE

Coursework: *Business analysis, operations management, information systems, organizational leadership*

CERTIFICATIONS

- Certified Business Analysis Professional (CBAP) 2015
- Chartered Property Casualty Underwriter (CPCU) 2018

TECHNICAL SKILLS

- **Insurance Domains:** Property, Casualty, Wholesale Insurance
- **Business Analysis Methods:** Requirements Elicitation, Process Modeling, Business Rules
- **Testing Practices:** User Acceptance Testing, Test Strategy, Defect Management
- **Delivery Methodologies:** SDLC, Agile Delivery, Hybrid Methodologies
- **Project Platforms:** Jira, Azure DevOps, Microsoft Project
- **Collaboration Platforms:** Confluence, SharePoint, Microsoft Teams
- **Process Modeling Tools:** Microsoft Visio, Workflow Diagrams, Process Maps
- **Insurance Applications:** Policy Administration, Claims Intake, Rating Services
- **Portfolio Governance:** PMO Partnership, Risk Management, Retrospectives
- **Data Analysis Tools:** SQL, Spreadsheet Reconciliation, Data Definitions
- **Requirements Artifacts:** Functional Specifications, Acceptance Criteria, Traceability Matrices
- **Stakeholder Delivery:** Executive Communication, Solution Owners, Business Testers

PROFESSIONAL AFFILIATIONS

- International Institute of Business Analysis (IIBA), CBAP professional community.
- The Institutes, CPCU professional community and property-casualty insurance network.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST