



KIMBERLY CLARK, MANAGING DIRECTOR, ANALYTICS & BUSINESS INSIGHT

Kimberly Clark is a Managing Director of Analytics & Business Insight for Advisor Services at Charles Schwab & Co. She joined Schwab as a member of the Management Information Systems organization and was instrumental in the vision and strategy that resulted in its transformation into a business intelligence organization. Kimberly started her career in consulting and is known for her tenacity, positivity and being solution-focused. As Ms. Woman Arizona United States 2017, she uses her platform to be an advocate for women in technology.



The Charles Schwab Corporation provides a full range of brokerage, banking and financial advisory services through its operating subsidiaries. At Schwab we believe in the power of investing to help individuals create a better tomorrow. We have a history of challenging the status quo in our industry, innovating in ways that benefit investors and the advisors and employers who serve them, and championing our clients' goals with passion and integrity. Ultimately, everything we do as a company – how we listen, how we solve, how we serve – is focused on helping our clients take ownership of their financial futures.

DEPARTMENT BREAKDOWN

WHAT ARE YOUR KEY DEPARTMENTAL OBJECTIVES OVER THE NEXT 6 TO 12 MONTHS?

Proactively provide analytical insight that influence key business decisions. Democratization of data through robust self-service capabilities. Enhance analytical skillset of current business intelligence staff.

WHAT IS YOUR CURRENT TECHNOLOGY STACK?

For our data and analytics ecosystem: Teradata, Oracle, SAP, Tableau, SAS, SQLserver, Informatica, Alteryx, Perl and .Net.

HOW MANY PEOPLE REPORT TO YOU (BOTH DIRECTLY AND INDIRECTLY)?

8

WHAT IS YOUR TOTAL BUDGET OVER THE NEXT 12 MONTHS PERIOD?

Up to \$10 million

PROJECT INSIGHTS

PROJECT OR INITIATIVE DESCRIPTION

Self-service Strategy for data, measurements and analytics to empower employees at all levels of the company to make data-driven decisions. Implement a self-service business intelligence solution Represent the infrastructure needs of Institutional Analytics organization Elevate and diversify the deliverables of my direct organization by including more analytics and partnership with our data science organization.

WHAT NON-BUDGETARY CHALLENGES DO YOU ANTICIPATE?

Support of legacy data objects and ongoing challenge of using business intelligence teams to provide workaround reporting solutions for application deficiencies.

WHAT 3RD PARTIES ARE YOU LOOKING TO MEET?

Any in the data and analytics space.

WHAT IS YOUR TIMELINE FOR IMPLEMENTATION?

12 to 24 months

WHAT IS YOUR BUDGET FOR THIS PROJECT?

Less than \$2MM

What technology/services are of strategic importance to you in the next 12 months?

Please indicate level of need/importance:

A=High Priority B=Priority C=Interest D=Low Priority E=Not A Priority

We realize everyone has priorities, so we asked the delegates theirs. This is so that we can create a more personalized experience for all our attendees.

Practical Application of AI	B
Effectively Leveraging Hybrid Cloud	C
Conversational Artificial Intelligence and Digital Banking Transformation	A
Pay People Without Checks or ACH Using Digital Push Payments	D
Ultra-High Performance Data Management to Handle the Concurrent Workloads of Transaction Processing and Analytics At High Scale with Superior Reliability	A
Robotic Process Automation for KYC, Lending, Client Onboarding, and Compliance Processes	C
Document Productivity and Workflow	D
Regulatory Challenges	E