

Joseph Thompson

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Professional Profile

An analytical, solutions-driven professional with experience designing and building process automation using Automation Anywhere and Xceptor within financial services. Skilled in developing scalable workflows for data validation, reconciliation, and system integration through APIs. Certified Lean Six Sigma Green Belt with a focus on improving operational efficiency and eliminating manual effort.

Experience

Robotic Process Automation Analyst

June 2025 – Current

Janney Montgomery Scott LLC

Philadelphia, PA

A leading wealth management and investment banking firm.

- Design, build, and continuously optimize automated business processes using Automation Anywhere and Xceptor, applying best practices to improve operational efficiency and reduce manual effort
- Partner with business stakeholders to analyze processes, identify automation opportunities, and develop creative, scalable solutions aligned with business requirements
- Leverage APIs, system integrations, and intelligent automation capabilities (OCR, document understanding, etc.) to enable seamless data exchange and support complex, end-to-end workflows
- Proactively troubleshoot issues, handle exceptions, and implement robust error-handling logic to ensure reliability and stability of automations

Business Innovation Specialist

March 2022 – May 2025

Lincoln Financial Group

Radnor, PA

Fortune 200 company providing financial security, with products including annuities, investments, life insurance, group protection, and retirement plan services.

- Partnered with business groups to design, build, implement, and update automated financial processes with UiPath Studio and monitored each process through UiPath Orchestrator
- Co-led a project to centralize audit intake requests through Smartsheet, building dashboards and automated reports for each business group to monitor progress
- Created recurring reports and dashboards summarizing automation activity across multiple business groups, highlighting operational efficiency gains and identifying opportunities for further optimization
- Contributed to process-improvement projects such as NIGO reduction, forms modernization, etc.

Education

Kutztown University of Pennsylvania, College of Business

2017 – 2021

Bachelor of Science in Business Administration – Finance and Business Management

Competencies

RPA & Automation

- ❖ Automation Anywhere
- ❖ Xceptor
- ❖ UiPath
- ❖ Power Automate

Data & Development

- ❖ SQL
- ❖ Python
- ❖ Postman/APIs
- ❖ Snowflake

Methodology & Tools

- ❖ Lean Six Sigma
- ❖ Generative AI
- ❖ SDLC
- ❖ Git