Walt Forbes

Enterprise AI Transformation & Governance

AI Strategy · Innovation · Workforce Enablement · Enterprise Architecture

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EXECUTIVE PROFILE

Enterprise technology professional with **27 years of experience**, including **23 years within Bahamian financial institutions**. Demonstrated leadership in AI adoption, workforce enablement and cross-functional transformation, complemented by extensive experience in enterprise architecture and regulated technology delivery, alongside capabilities in AI agent development, governance framework design and evidence-led innovation.

Microsoft Certified AI Transformation Leader and Azure Solutions Architect Expert. Integrates engineering depth, instructional expertise and responsible AI practices to build sustainable internal AI capability, from opportunity assessment and governed experimentation to adoption and performance measurement.

SELECTED CAREER IMPACT

27 Years in technology	**23** Years in banking	**200+** Virtual machines modernised
44 of 51 Voluntary AI programme enrolment	**69** Professional certifications earned by participants	**196** Microsoft Learn badges earned by participants

AI adoption results: UBS Nassau Branch | September 2025–February 2026

FLAGSHIP ACHIEVEMENT | AI ADOPTION AT UBS

- **Programme leadership:** Conceived, designed and led a voluntary, cross-departmental AI adoption initiative, enrolling **44 of 51 staff across six departments**, with **43 active members**.
- **Learning attainment:** Participants earned **69 professional certifications** and **196 Microsoft Learn badges** through structured learning pathways, practical engagement and recognition mechanisms.
- **Workforce enablement:** Delivered short teaching sessions, office hours, role-based training and **one-to-one executive coaching**; used gamification and recognition to encourage participation.
- **Performance visibility:** Designed and published a Power BI learning model and leaderboard, **refreshed five times daily**, to track achievements and support engagement.

CORE LEADERSHIP CAPABILITIES

01 Strategy & Portfolio

AI maturity and readiness assessment, transformation roadmaps, use-case prioritisation design, evidence-led technology evaluation.

02 Governance & Assurance

AI operating model and control design, responsible AI, human oversight, evaluation planning and source verification.

03 Workforce & Adoption

Programme leadership, organisational change, role-based curricula, executive coaching and proficiency measurement.

04 Delivery & Value

Agentic AI solutions, knowledge grounding, rapid prototyping, validation, operational analytics and KPI design.

PROFESSIONAL EXPERIENCE

Associate Director, Technology

UBS AG, formerly Credit Suisse

May 2008–Present

Nassau Branch, The Bahamas

Previously Senior IT Specialist / Assistant Vice President under Credit Suisse.

AI, transformation & organisational leadership

- **AI enablement:** Led the cross-functional AI adoption programme on page 1; supported business users, IT staff and executive management in developing practical Microsoft 365 Copilot skills.
- **Governed AI practice:** Worked within bank AI controls covering approved tools, data-entry restrictions, sensitivity labels, use-case classification, approval workflows and agent-owner affirmation.
- **Change & analytics:** Led Cultural Ambassador, peer-recognition and mentorship initiatives; completed Global IT Leadership training in transformational change and earned the **top peer-recognition score across IT Americas**. Published ServiceNow change-request KPI reporting in Power BI.

Enterprise architecture, delivery & resilience

- **Modernisation:** Engineered the migration of a VMware estate supporting **more than 200 virtual machines** from legacy infrastructure with **zero service disruption**; implemented disaster recovery infrastructure in Switzerland.
- **Business-critical systems:** Led core banking upgrade integration, regression testing and deployment automation across banking, customer, document-management and reporting systems in **Nassau, New York and Chile**.
- **Security architecture:** Designed cross-forest Active Directory trust and access arrangements; architected the controlled retirement of a secure network for execution by global technology teams.
- **Cloud & collaboration:** Architected Teams and SharePoint environments with repeatable workspace patterns and governed content workflows; designed and deployed Azure Kubernetes Service environments using Terraform.
- **Risk & commercial contribution:** Delivered KYC/World-Check technology with regulatory reporting and endpoint-security controls; contributed to storage vendor selection, comparative evaluation and pricing negotiations.

Bank of The Bahamas

Sep 2003–Apr 2008

Network Systems Administrator

Managed multi-site banking infrastructure across The Bahamas (Andros, Grand Bahama, Exuma, Inagua, New Providence) and Miami, including network redundancy, identity, security and business-system integration. Implemented technology infrastructure for **four new branch openings**.

The Training Centre

Feb 1999–Feb 2005

Chief Instructor & Technical Programs Coordinator

Designed technical curricula and hands-on laboratories, delivered instructor-led programmes and onboarded instructors, establishing the workforce capability-building discipline that underpins current AI enablement work.

Independent IT Consulting

Feb 1999–Sep 2003

Freelance IT Consultant

Provided networking, server, security, data-recovery and business-solution support to eight commercial clients across financial services, healthcare and retail. Instructional and consulting roles overlapped, including instruction alongside banking employment from 2003.

AI INNOVATION PORTFOLIO & CREDENTIALS

SELECTED AI PORTFOLIO | SOLUTION BUILDS & DESIGN WORK

Enterprise AI governance operating model | PROPOSED FRAMEWORK

Designed a proposed governance constitution and implementation package for a regulated institution, covering decision rights, ownership, safeguards, use-case lifecycle controls and escalation. Developed a phased AI maturity model and implementation playbooks.

PROMETHEUS AI assistant | DEVELOPED SOLUTION

Built a reusable prompt-engineering assistant and ChatGPT plugin with structured behavioural instructions, requirements clarification and quality safeguards; designed an evaluation plan with test scenarios and acceptance criteria.

IT Policy & Procedures agent | BUILT & DEPLOYMENT-TESTED

Built and deployment-tested a Copilot Studio assistant grounded in authoritative SharePoint content; validated updated-source retrieval and agent availability in Microsoft 365 Copilot and Teams.

AI adoption & governance learning programmes | DESIGNED PROGRAMMES

Designed a 90-day enterprise Copilot adoption programme and a multi-tier AI Governance Academy, including training curricula, role-specific exercises, KPIs, assessments and governance controls.

Reusable AI skills & plugins | BUILT & VALIDATED SKILLS

Built and validated task-specific Copilot Skills for M365 apps.

APPLIED AI ENGINEERING & TECHNOLOGY PRACTICE

Agentic AI & knowledge architecture — Copilot Studio, Agent Builder, custom GPTs, custom skills and plugins; SharePoint and Microsoft Lists grounding, agent testing, publishing and troubleshooting.

Prompt & context engineering — System and agent instructions, reusable prompt frameworks, task decomposition, structured outputs, persistent project context and knowledge handoffs.

Research & assurance — Deep Research, authoritative-source curation, cross-model validation, human-in-the-loop verification, adversarial test design and AI extension security review.

Platforms & workflow design — Microsoft 365 Copilot, ChatGPT Projects/Work, Claude Projects/Cowork, Perplexity Projects/Work and comparative Gemini use. Foundational Power Platform and Purview knowledge; MCP connector usage and troubleshooting.

SELECTED PROFESSIONAL CREDENTIALS

AI Transformation Leader	**Azure Solutions Architect Expert**	**AI Business Professional**
Microsoft Certified	Microsoft Certified · Feb 2026	Microsoft Certified

Selected AI coursework — Generative AI for Leaders; Trustworthy Generative AI; Artificial Intelligence in Wealth Management.

Cloud, architecture & security — Microsoft Certified: Azure Administrator Associate; Azure Data Fundamentals; Security, Compliance, and Identity Fundamentals; Microsoft 365 Fundamentals. AWS Cloud Practitioner; CompTIA Cloud+; LPI Linux Essentials.

Engineering foundation — Previously earned credentials include VMware VCP6-DCV, Cisco CCNA, Microsoft MCSE/MCSA, CompTIA A+/Network+ and Novell CNA. **More than 40 certification examinations passed** throughout career.

EDUCATION

B.A., Chemistry / Biology (Double Major) — Macalester College

A.A., Biology / Chemistry (Major / Minor) — College of The Bahamas