**GENERAL BACKGROUND**

Senior Techno/Functional Consultantwith over 20 years’ experience facilitating successful development and deployment of strategic and tactical plans/ activities 'for' and 'on-behalf' of major corporations, government and technology solution firms. Experienced and well-rounded in working with difficult clients and Chaotic /Complex initiatives in the areas of: PMO/Project/Program Support and Rescue, Agile Transformation/Coaching, Strategic Planning & Vendor Sourcing; Business Solutions Architecture, Program Analysis, QA Automation and Full Lifecycle Application Development/ Reengineering (Proprietary and COTS).

**CORE EXPERIENCE**

* **Strategist** – (Program, Project, Risk and Operations) Highly effective and instrumental at assisting organizations realize their goals by helping define strategy and/or manage risk that can have adverse impact on end-state –or day-to-day operations– via deficiencies in our operational thinking, internal/external elements, program/project strategies, or adherence to regulatory and/or compliance mandates
	+ SWOT, Micro and Macro Environmental Analysis
	+ ERM/GRC - Framework (Enterprise Risk Management / Governance, Risk & Compliance)
	+ Risk Assessment Tools, Reports, Templates Approach and Strategy
	+ **Project, Program, Software, Compliance, Governance, Operational Change Management**
* **AGILE SCRUM MASTER | COACH AND MENTOR | PMI-ACP Certification (August 2019)** **–**well versed and experienced in a multitude of agile transformation and project engagements requiring the quick up-start and mentoring of individuals and teams in the fundamentals of Agile/SCRUM application/practices, tools and processes, including SAFe framework. **Areas and work include:**
	+ Improvement of Scrum/Development team and overall project management process by increasing collaboration, innovation, and introducing techniques that promote adaptability and flexibility in the face of unpredictable circumstances.
	+ Adoption and improvement of **Agile** methods and practice by helping rethink the manner in how teams approach and conduct development
	+ Providing training and skills that lead toward the organization-wide adoption of agile framework.
	+ Providing feedback and means of improving practice and delivery (catalyzing organizational growth and answering questions).
	+ Providing hands-on support and collaborating across widely varying levels and roles in order to provide further understanding and adoption of Agile - as well as overall company growth and improvement.
	+ Development of adoption strategies for every phase/stage; from the introduction of Agile and employee education, to fostering teams and cultures that practice Agile, to sustaining Agile methodologies and continually offering strategies for improvement.
	+ Access, set-up and work within Jira, Azure DevOps, Team Foundation Server (TFS), Confluence, and HipChat. Including User Story writing, estimation, release planning; end of sprint delivery vs. releases; product owner training, project re-architecting for agile initiative and testing within agile.
* **Sr. Project, Program and Portfolio Manager): (**MS Project / Server, Jira, MPMM, Clarity, HP PPM, PPM/ OPM3, Share Point, RedMine, Base-Camp, Work Space): Seasoned business and technology management consultant with tier ONE, Global, Multi –Industry, and EPMO experience; managing hi-profile, complex, enterprise wide, strategic and tactical initiatives; within highly fragmented and fast-paced (chaotic) environments.
	+ **Over 20 years’ experience** driving initiatives under various conditions and methodologies (Agile, Spiral, Waterfall, RAD, RUP) **using the PMI PMBOK Framework and /or ITIL Governance where requested / required.**
	+ **Program / Project Strategist**. Experienced and well versed in enterprise, multi-year, initiatives; developing program strategy and road-map; establishing project team, program/project scoping, resource tracking/allocation; budget management and reporting.
	+ Experienced in the creation and housing/management of all documents/artifacts pertinent to the governance and management of [all] project level phases and cycles; (e.g. Project Charter, Business Case, Feasibility Study, Project Plan, Communication Plan, Acceptance Plan, Financial Planning and Monthly Analysis of Projects and Programs, Resource Plan, etc.).
	+ Well versed in multiple areas of SDLC methodologies (Agile, RUP, RAD, Spiral and Waterfall) –and various Project, Program and Portfolio tools/applications (e.g. HP PPM, Clarity, RedMine, SharePoint, etc.).
	+ Veteran of multiple end-to-end and specialized project initiatives – including project resolution and triage engagements; strategic planning and tactical execution; project assessment, corporate actions, merger and acquisition, transition, system integration, reengineering, vendor bid process management, documentation, business transformation, compliance and certification.
	+ **Highly skilled and experienced** in business process and relationship management activities to include: facilitation of multi-departmental and one-on-one activities; tiger-team sessions, project resolution management initiatives, JAD sessions, strategic and financial planning; contract/SLA negotiations, arbitration, process reengineering and risk management
* **Business *and* Systems Analyst: *(RequisitePro, Case Complete, Enterprise Architect, Smart Draw, Visio, Excel, Access/SQL Database, PowerPoint, MS Office Suite)*** highly skilled and well suited for complex BA / BSA initiatives in where strong business, analytical and organizational skills are required to [help] uncover, document and provide a consensus- driven, strategic road map, for tactical deployment.
	+ ***Instrumental*** in planning, soliciting, interpreting and depicting pain-points into business requirements for solicitation of product/services, visioning, developmental and/or ***processes reengineering*** / ***business transformation*** initiatives.
	+ Highly effective in information gathering and assessment; as well, as in the use of such gathered information to develop and/or deliver 'structured' functional and technical documentation/drawings needed to assist in reaching consensus amongst stakeholders -and providing analysis through future state.
	+ Additional experience, skills and tools in this area include; Joint Application and Requirement Development sessions (**JAD/JRD**), **BRD, FRD, FSD, BCD, UML, VISIO, Use Case and Requirement Modeling; Business Justification** development, **Data & Information Management, SQL / Access Database Query**, Feasibility Studies; Solution Assessment and Validation; **SDLC** (Agile, RUP, RAD, Waterfall and Spiral) - requirement planning and management; business process improvement, documentation  and design-development of current and future state, workflows and/or business data (workflow) architecture.
* **Seasoned QA Lead / Manager / Strategist: (HP Quality Center, QMetry (Gherkin), JIRA, Bamboo) with** expertise in the planning, modeling and development/execution of testing framework and process methodology for [both] traditional project and event-driven / ***agile*** testing. Experience in the planning and development of QA test practices /disciplines, initiatives, and documentation; including, but not limited to; plan, strategy, calendar, logs, artifacts, scripts, test scenarios / cases, incident (bug) reporting (forms and processes), regression testing, test training, mentoring and management; as well, as seeing through all levels of testing associated with; conversion, unit, interface, integration, system, UAT, performance and security testing
	+ Unit, UAT, Interface and Integration Testing
	+ System / Functional and Non-Functional Testing
	+ Smoke, Black, Grey and White Box Testing,
	+ Performance / Load Testing
	+ Usability and Stability Testing
	+ Static and Dynamic Testing
	+ Manual and Automated Testing,
	+ Alpha and Beta Testing
	+ Security and Audit Testing (i.e. PCI, COPPA, HIPPA)
* **Release Manager / Lead:** Well versed and experience as a release project manager / lead responsible for coordinating and managing release level activities to support all projects within the release; such actions/ activities to include; setting –up the release project plan and ongoing meetings; documentation of projects within the release, identification of release lead team, setting up project codes within time tracker, and HP Quality Center; identification of risk and constraints of all projects; QA schedules , rounds and dates; QA build request, packaging and deployment dates; preview dates for release; DevStage and QA environment track; DBA, Infrastructure and environment task review, etc.
* **Vendor, Product Selection, Procurement, Strategic Sourcing and Vendor Management:** Well versed in the development, execution and management of campaign initiatives associated with the evaluation / proposition of outsourcing [BPO] services; and/or vendor product selection management operations otherwise known as strategic sourcing.
	+ Experience in ROI development, assessment and risk / cost analysis; including the capturing of requirements and converting of such data into RFI/RFQ/RFP documents for bid, Contract, SLA, Vendor Score-Card and POC processes.

**TECHNICAL**/*FUNCTIONAL SKILLS*

* **Project Management & Collaboration Tools/Systems**: Jira, MS Project/Server, RedMine, SharePoint, Confluence, Base Camp
* **Project, Program & Portfolio Management Tools (PPM):** PMBOK Framework, Clarity, HP PPM, RedMine, Work Space, Project-Open
* **Compliance:** Information Assurance, SEC Compliance, SAS70, ISO, HIPPA, PCI, COPPA, PTC Compliance (Positive Train Control), and SOX
* **Organizational Change Management (OCM)**
* **Governance Risk Management & Compliance (GRC)**
* **FULL LIFECYCLE DEVELOPMENT /RE-ENGINEERING (COTS / PROPRIETARY)** well versed and experienced in the drafting of strategic and tactical plans - for the visioning, planning, uprooting / replacement, procurement / purchasing, reengineering / building, customization, integration, rollout / deployment, and testing of both **home-grown (Proprietary) and Custom-Off-The-Shelve Systems / Software (COTS)** in the areas of:
	+ **Financial / Brokerage / Treasury Systems and Feeds**: SWIFT, FedWire, FIX, MHS Messaging, Cosmic, Titan, DataMart, Bullet, Advantage, GDH Valuation, Sunguard Adaptiv, ECDS - Enterprise Commercial Deposit System, Evare, iVault, WDC DDA Accounting, WebCMS, GLS - Gen Ledger System, CITCO, HYDRA, Bloomberg TOMS, Destination Station, Bloomberg, Market, Reuters, Wall Street On-Demand, CNBC, BPipe
	+ **Cloud:** TaaS, IaaS, SaaS, Cloud Computing: Messaging and Collaboration (M&C), Google, Gmail, SharePoint, MS Office, Subscription Management System (SMS), Address Validation and Correction Systems.
	+ **Enterprise Resource Planning Systems (ERP):** PeopleSoft (HRC 9.0/FMS/SCM), SAP (SD/MM/FICO/SCM/DQM/ACE), Siebel (CRM/eMedia) & Oracle (Financial/OBIEE/Campaign Manager)
	+ **Content Management Systems (CMS):** Documentum (Webtop and D2), Word Press, Drupal, Paper Vision, File-bound, RedMine, Story, SharePoint (Development & Administration)
	+ **Content Relationship Management (CRM):** MS Dynamic, Sales Force Automation (SFA), Siebel, ACT & Goldmine
	+ **Ecommerce:** IBM WebSphere, Think Subscription, Digital River, Responsys, Google Analytics, Webtrends, Omniture
	+ **Trade Order Management Systems** (**TOMS)**: - EZE
	+ **Order Subscription Management System**s (**OSMS)**: - Think Subscription (now Digital River)
	+ **Pension System:** Sagitec
	+ **IT Management Suites/Systems (ITMS):** ServiceNow (Incident, Problem, Request and Change Management – including Service Catalog
	+ **Enterprise Asset Management (EAM):** IBM Maximo
	+ **Point of Sales Systems (POS):** Proprietary Retail & Restaurant Systems
	+ **Legal Case Management Systems** (**LCMS):**  Smart Advocate
	+ **Portal Builder**: TIBCO / Buildagate
	+ **Accounting Systems**: Mass90, Oracle Financials, Peachtree
	+ **Payment Systems & Aggregators:** PayPal, mBlox, End2End, Netsize, Mindmatics;

**EXPERIENCE**

**Windstream,** Little Rock, AR October 2018 – Present

Senior Consultant / Technical Project Manager / Business System Analyst / Scrum Master, Coach and Mentor

Secured as a techno/functional consultant - to assist with the ongoing agile modeling and transformation of a voice and data network communications and managed services company who has just completed the acquisition of Both EARTHLINK and BROADVIEW COMMUNICATIONS.

Fast-pace, chaotic /politically charged environment - with 70% of all employees/resources working remote. Responsible for the on-going planning and management of agile, project/ sprint activities – for the organizations premier division known as SDWAN; this to include, along with the Product Owner, the building (or in this case the reverse engineering) and maintenance of that division’s product backlog, and all of its activities and components needed to run a stream of successful sprints. Additional responsibilities would include

* Lending of expert advice in the shifting of a dysfunctional adapted agile practice/environment to one of standards and best-practices.
* Adapting and training the organization in the use of its chosen agile-platform (TFS /Azure DevOps) and migration away from Jira.
* Incorporating (slowly) procedures and processes – in line with agile best-practices to help maximize output and change the direction of the previously adapted agile model
* Buildout of ad-hoc communication and reporting processes amongst disparate and multiple teams with delivery responsibilities.
* Closely work (day-to-day) with QA, IT and Business – to assure adherence and outcome
* Work closely with QA to assure proper planning and thorough testing of all deliverables prior to release.
* Mitigate risk (daily) to off-set the impact of process deficiencies within the agile model being changed.
* Overcoming resistance and helping effect change within an organization with little appetite for change.

**Florida Power and Light (NextEra),** Palm Beach, FL August 2016 – August 2018

Senior Consultant / Strategist / Program – Project Manager/Scrum Master, Coach-Mentor / QA Manager/ Analyst;

Secured as a techno/functional consultant, strategists, program analyst/manager - to assist with the ongoing transformation Information Management Services Department (IMS) in the planning, building and execution/deployment of planned and unplanned – critical/hi-profile and day-to-day initiatives leveraging both Agile/SCRUM/Jira (Scrum Master/ Coaching) and traditional Waterfall methodology.

Providing guidance and strategic direction while communicating ‘with’ and keeping abreast ‘stakeholder’, ‘project sponsors’, ‘leadership teams’ and ‘steering committees’. Responsible for overseeing and managing technology resources and project teams through the delivery of projects and planning/execution of QA. Engagement is specific to the crafting and delivering of services to all portfolios and fleets within the Power Group Division of Florida Power and Light (i.e. *Wind, Central Organization, Central Maintenance, FPL (Florida Power & Light) and F&S (Fossil and Solar)).*

Engagement Highlights:

1. Highly politically charged environment with complex client and stakeholders
2. Consistently managing between 5-8 initiatives at any given time
3. Business Transformation Team Lead Member for Agile and QA Automation
4. Mobility (Application) Team SCRUM Master / Mentor and Coach
5. Maximo Team SCRUM Master / Mentor and Coach
6. Documentum (D2) Team SCRUM Master / Mentor and Coach
7. Nuclear Team SCRUM Master / Mentor and Coach
8. Program/Project Strategist, Advisor and Analyst

**IPT,** Rahway, NJ November 2015 – July 2016

Chief Strategist / Solutions Architect / Program-Project Manager / Agile Scrum Master, Coach-Mentor

Secured as a senior consultant / strategist- for an M&A initiative during the acquisition and merger of [a] newly acquired entity/business within the document management [services-bureau] space. Engaged as a strategic member of an advisory/tiger-team panel to help plan, advise and incorporate unified, and best-practice change(s) within the organization, and amongst the various new department, systems, practices and processes now coming into the organization. Key areas of engagement would include:

1. The building, implementation and management of an Organizational Change Management (OCM) Strategy/Campaign
2. Incorporation of Agile principals and model
3. The analysis, decommissioning and/or alignment of all IT & Business Systems / Applications
4. The evaluation and restructuring of the e/PMO engineering practices, operations and playbook
5. The evaluation and restructuring of the existing portfolio of client business solutions and offerings
6. The evaluation and restructuring of the existing practices/processes undertaken by [the] Marketing, Sales, and Pre-Sales Engineering teams/departments
7. The evaluation and process being undertaken to announce and integrate the newly acquired client base
8. The evaluation and incorporation of new platforms to facilitate CSR practices around CRM and Helpdesk operations

**Consumers Energy, Jackson, MI**  February 2015 – October 2015

**Industry:** Public Utility Company

**Engagement Type & Environment:** IT, Strategic Planning. Program/Project Management / Agile Transformation **Project:** Technical & Functional

**Role:**  Business Solutions Architect / Senior Strategist / Program- Project Manager / Agile Scrum Master, Coach and Mentor

Engaged to assist in the strategic planning, program/project management – and course correction of multiple hi-profile technical (IT) initiatives/studies; collectively budgeted at $28M. All projects tasked with delivering upon their individual scope/vision within the IT portfolio while operating as prescribed by the client’s governance body (i.e. PMO, Financial Accounting Department and Leadership Committees).

Initiatives facilitated would include:

1. **(TaaS Study)** Public, Private and Hybrid Cloud Study: Commissioned and executed over a 3-month span to help identify a best practice CLOUD action - and creation of a blue print for execution via the delivery of a Strategy, Design and Execution Plan document.
2. **(Private Cloud) *–*** Planning and build-out of an IaaS Strategy and Environment – which would (a) automate the provisioning of servers via a self-service portal– (b) facilitate the on-demand leasing of fulling provisioned and patched Virtual Machines (VM’s) – and the leveraging of change, chargeback and capacity management reporting– (amongst many other activities).
3. **(Vblock / Converge Infrastructure) -** The planning, building and rollout – of a new infrastructure platform to facilitate the Private Cloud initiative – while [also] migrating Call Center and SharePoint operations
4. **(ServiceNow)** – the decommissioning of Service Manager 7 – and Rollout of ServiceNow
* **Complex, Fragmented Environment – Difficult Client.**
* Provide expert consultation – analysis and management on the strategy and deployment of key critical initiatives
* Provide Agile Scrum Master, Coaching and Mentoring leadership
* Coordinated elicitation of requirements and formal document to address complex questions and PMO/Gate deliverables
* Captured and analyze information to build-out a strategic approach, to address client/project needs and challenges.
* Deployment and Management of Agile practices and team
* Monthly financial reporting and alignment with senior leadership and financial team
* **Testing and HOTS** Development Plan (Hand of to Support)
* Oversight of BA team
* Vendor Management
* Oversight and Management of Strategic Sourcing activities (RFP/RFI) for engagement of product/services.
* Program/Project Management and Reporting
* Central point of contact for project and vendor inquiries

**BNSF Railway, Fort Worth, Texas**  August 2014 – January 2015

**Engagement Type & Environment:** Compliance / Strategic Sourcing **Project:** Technical & Functional

**Role:**  Senior Strategist / Program Consultant / Agile Scrum Master, Coach and Mentor

Engaged as a senior strategist / program consultant to assist in advising and identifying a strategic solution to prescreening -locomotive database trackfiles - before moving these into formal lab testing. As part of a Federal [compliance] mandate - known as PCT (Positive Train Control) - the creation and testing of database trackfiles would facilitate and allow BNSF to build-towards - and achieve - full PTC compliancy by December 2015 –

* Provide expert consultation and analysis for incorporating a solution to prescreen locomotive database trackfiles.
* Elicitation of requirements and formal document including the facilitation of both Scope and Visioning sessions
* Captured and analyze information to build-out a strategic approach, to addressing the client’s needs, via a strategic sourcing engagement
* Provide Agile Scrum Master, Coaching and Mentoring leadership
* Developed/Executed all activities and artifacts required to facilitate the above - including:
	+ Process and data analyses of Testing, GIS and Signal Department Information
	+ Familiarization with PTC compliance mandate and schedules
	+ Development of activities and timeline to execute and manage a successful sourcing engagement
	+ Development of RFI, Vendor Scorecard and POC document
	+ Development and administration of both ‘project’ and ‘vendor’ portals via SharePoint team sites
	+ Forming of steering committee for ‘RFI/POC” review and ‘TOOL’ selection process
	+ Central point of contact for project and vendor inquiries

**Teachers Retirement System for the City of New York (TRS)**  March 2014 - August 2014

**Industry:** Financial / City Agency

**Engagement Type & Environment:** Formal PMO, Vendor, Strategic & Operational Risk Management **Project:** Technical & Functional

**Role:**  Senior Project Manager / Assistant Program Manager / Agile Scrum Master, Coach and Mentor

Engaged as a senior program advisor / consultant to help manage – and provide[both] insight and assistance, to the program management team, in the strategic planning and execution, of [a] multi-year, ***$200M dollar***, enterprise level program slated to replace the Teachers’ Pension Retirement System of the City of New York.

* **$200M dollar – Five (5) year budget**
* Provide expert consultation on enterprise level implementations of a pension technology systems
* Attended scope / visioning session, alongside senior management, to provide strategic program insight and advise
* Provide Agile Scrum Master, Coaching and Mentoring leadership
* Independently help manage various projects/ resources/ efforts to support the program.
	+ Working IT / PMO Liaison (Technical / Functional)
	+ Creation of Role Base Access Control framework(RBAC)
	+ SharePoint (Rollout) Design, Development, Training and Administration
	+ Department liaison (PMO) for Security and Risk team
	+ Lync Rollout (Office 365)
	+ Master Project Plan Creation for core, vendor and multiple project streams
	+ Creation of release management strategy /plan
	+ Intranet redesign via SharePoint
	+ Agile / SCRUM Framework development and training
	+ Agile (QA) framework development
	+ SharePoint user and administration training
	+ User Story framework, training and oversight
	+ Vendor Co-Management
	+ Manage vendor relationship from RFP through closing, including contract negotiation

**Consumers Energy (**Jackson, Michigan) Jun 2013 – March 2014

**Industry:** Professional Power, Gas & Electric Company

**Engagement Type & Environment:** Contract, Formal PMO, Vendor & Change Management (OCM), Strategic & Operational Risk Management, Release Management

**Project:** Technical & Functional - Program Strategist / Analysts / Agile SCRUM Master, Coach and Mentor

**Role:**  Senior Consultant / Analysts

**Project Methodology:** Waterfall and Agile

**Project CORE / Workstreams:** Engaged, by Detroit, Michigan’s, Power Company, as a senior program analyst / strategist and Agile SCRUM Master, Coach- Mentor – to help manage, define and mold an emerging technology program - and strategy / road-map through 2016.

The CCP division (Communications, Collaboration and Productivity) – takes-part in an annual ***89.5M*** technology budget – and is tasked with delivering solutions to address an end-state vision of tomorrow’s office needs.

Initiatives currently being worked with in both promoting and mobilizing via analysis, business case development (BCD), financial and project planning - are approximately 35 initiatives; these to include: i) SharePoint, SharePoint IA and various other Share Point Initiatives, ii) BYOD (Bring your own device) Personal, Corporate and Any Device Any Where, iii) UC (Unified Communication) Telephony, Voice and Video, iv) Video Conferencing, v) Mobility Strategy, vi) Office 365, vii) Knowledge-based Transfer – and viii) LYNC.

1. ***$89.5M Budget***
2. Provide Agile Scrum Master, Coaching and Mentoring oversight/ leadership
3. Participated - and/or provided process / execution opinion / direction on CCP strategic matters
4. Supported program director in tracking - and formulating funding strategy for candidate projects
5. Worked closely with finance departments - to adhere to approved budget - and both Capital & O&M threshold
6. Carried-out 'high-profile' cost comparison analysis between exiting and new technologies offerings
7. Spearheaded the process plan and strategic approach for creation of a program strategy and road-map
8. Help defined and align program offerings via visioning, stakeholder, gap and product analysis
9. Helped define program approach & strategy via SWOT, Micro and Macro analysis
10. Mentored other analysts and department managers

**IEEE -** Institute of Electrical and Electronic Engineers Feb 2013 - Jun 2013

**Industry:** Professional Association - 400,000+ Members, 20K + employees, 160 + Countries

**Engagement Type & Environment:** Contract, Formal PMO, Global, Vendor & Change Management (OCM), Strategic & Operational Risk Management

**Project:** Technical - PMO Project Initiation and Management of SAP (DQM/ACE), Siebel (eMedia - Campaign Management, CRM), Oracle (eBusiness Suites) Initiatives, eCommerce and Membership initiatives

**Role:**  Senior PM / BA / SCRUM Master, Coach and Mentor

**Project Methodology:** Waterfall and Agile

**Project CORE / Workstreams:** SAP, Siebel (eMedia) and Oracle ( E Business Suites) Initiatives, HP PPM, eCommerce, Order Management, Campaign Management, Project Proposal Preparation and Presentation - Chaotic and Fast Pace Project Release Environment - Strong leadership and Inter-Personal skills required

**Scope:** Engaged as a technical senior consultant (PM/BA/ Scrum Master) to assist, both the IT and PMO, in the day-to-day business of initiating, building and managing a large array of various types of projects (15) earmarked, via HP PPM, for an end-of-year release of 37 initiatives via the leveraging of Agile work and principals.

Heavy HP PPM, BA and documentation experience required to develop Business Case Documents (BCD) - for all projects involved in release. Update project history in PPM, execute Change Request's (CR), where required, run JAD sessions, gather requirements, collaborate in the building of a Master BRD - and Functional Specifications - along with all supporting documentation (i.e. Use Case, Workflow Diagrams, Screen Shots, Straw Man, Mock Up's, Business Justification, Current/Future State diagrams, etc.)

Responsible for adhering to IEEE project governance & methodologies, while helping to create and present, along the various toll-gates - all artifacts needed by committees for project review, funding and approval

Core responsibilities are consistent in working with all [IEEE] business divisions and groups, including key stakeholders, up to C-level, steering committees, PMO, engineering and development teams - vendors and offshore resources.

**Pearson Technology –** GlobalSep 2012 - January 2013

**Industry:** Education / Media / Print

**Engagement Type & Environment:** Contract, Formal PMO, Global, Vendor & Change Management (OCM), On/Offshore Operations, Strategic & Operational Risk Management **Project:** Global -Wide Migration of over 250,000 users to a Cloud Solution

**Role:**  Senior BSA/PM/ Scrum Master, Coach and Mentor

**Project Methodology:** Agile

**Project CORE / Workstreams:** Business Relationship Management, Business Impact Analysis, Business and User Data Collection, Issue Tracking via Jira, Google MyCloud, SharePoint, Application Analysis, Training, Client and Management Facing **Scope:** Engaged as a senior consultant, via the UK EPMO, to help facilitate and expedite the analysis of a high-profile, enterprise-wide, global initiative, impacting over 70-countries via the leveraging of Agile work and principals.

The Messaging & Collaboration initiative (M&C) is challenged with both the rolling-out and migrating of all messaging and collaboration services (over 250,000 users) to a Global, Cloud-Base Service Model
Core responsibilities are consistent in working with all [Pearson's] business divisions and groups, including key stakeholders, up to C-Level, steering committees , [the] PMO, engineering and development; in-order to ensure that all requirements and business processes are being fully analyzed; so as to accurately understand the impact to business, and its processes, affected by the move to the Cloud.

**Weight Watchers, Inc. -** New York CityFeb 2012 - Aug 2012

**Industry:** Health & Fitness

**Engagement Type & Environment:** Contract, Formal PMO, Global, Vendor & Change Management (OCM), On/Offshore Operations, Strategic & Operational Risk Management **Project:** (Implementation) Ecommerce, System Decommissioning, Enhancements, Release Management

**Role:** BA/ PM / Scrum Master, Coach and Mentor / Release Manager

**Project Methodology:** MS Project / Agile / SCRUM / Waterfall

**Project CORE / Workstreams:** Ecommerce, Mobility, SCM, ERP, SOA, Fulfillment, CMS, CRM (SFA), Legal, Compliance, UX, Front & Back Office, B2B / B2C, Accounting, Business / System & Process Analysis / Reengineering, QA and Release Management

**Scope:** Engaged by the PMO to oversee the identification, development and rollout of a CORE ecommerce business platform to be rolled-out to both the US and UK - and [eventually] globally to 22 other partnering countries; all efforts would simultaneously coordinate [a] business process plan / model to be used, moving forward, by the PMO, for executing all future global rollouts of the eCommerce platform / model – via the leveraging of Agile work and principals

eCom areas of focus would be across the board with special attention being given to identifying and documenting procedural areas requiring [process] work, by other regions, that might require a different process procedure, due to that regions policies, laws and/or local practices. Some of these areas and practices would be: Legal, Vendor / Supply Chain Management (SCM), Customer Support, Shipping, Payment Gateway, Reporting, Email and Analytics, Content Management, Change Management (OCM), Merchandise Catalog, Return & Refund, Taxes and Front/ Back Office.

* Maintained adherence to Weight Watchers (WW) PMO project methodology; delivery of documentation against WW Proprietary SDLC; managing and facilitating a wide variety of `JAD/Planning' discussions; amongst and between senior management, project stakeholders, technology personnel and vendors
* Provide Agile Scrum Master, Coaching and Mentoring leadership
* Provided direction, and oversight, in the eCommerce world, for both desktop and mobile initiatives believed to be helpful in complementing the overall eCommerce and Global business model.
* Managed the decommissioning of a B2B sales platform while simultaneously migrating all services to new systems - including
* Drove all projects to meet timeline through strategic, tactical, QA and release phases -  this to include management of all level of efforts (LOE) including Engineering, IT, IA, Editorial, Copy and HTML efforts
* Recruited early in project to manage entire project release consisting of 8 Project Managers and 26 individual projects being rolled-out to 22 separate countries.
* In the Release Manager role, responsible for planning, managing and facilitating all aspects of QA planning, Release and Environment Building; including [the] chairing of weekly meetings `between and with’ other PM, Engineering, IT, Business and Management staff to discuss the progress of all projects and their individual statuses, risk and issues impacting the timely release of each.

**First New York Securities (Hedge Fund) -** New York City Jul 2011 – Jan 2012
**Engagement Type & Environment:** Contract, On/Offshore Operations, Vendor, & Change Management (OCM), Release Management, Strategic & Operational Risk Management

**Industry:** Financial - Hedge Fund
**Project:** (Implementation) Trade Order Management System:

**Role:** Senior Project / Program Strategist & Resolution Manager / Agile SCRUM Master, Coach and Mentor / BSA

**Project Methodology:** MS Project / Agile / SCRUM / Waterfall

**Project CORE / Workstreams:** Trade Order Management System (TOMS), Legal, Compliance, Risk, Front & Back Office Operations, Accounting, Business / System & Process Analysis / Reengineering, QA, Information & Data Modeling, System Configuration, Training, Domestic, International, Commodities & Macro Trading Desk Operations, Risk and exposure, exchange, platform, and asset class , Security Master;  Broker, Trader Information, prime Broker, CITCO, Broker Commission, Exchange Fee’s, Allocation, Destination Station Requests; FIX Messaging/Mapping, UUID, Data Feed, Pricing, Analytics, B-Pipe and Market Data

**Scope:** Engaged, mid-stream, to oversee, drive and gain control over – the planning, set-up, configuration and end-to-end, roll-out, and release management, of a ***$17.5M*** Trade Order Management System (OMS)– via the leveraging of Agile work and principals- in an environment, with over 300-traders; in where the strategic phase of the project was loosely executed, and NO PREVIOUS OMS existed ***(fast paced- chaotic environment)***

Responsible for assessing state-of-project and helping develop new plan to put project back on track. Worked extensively with stakeholders, operations (back-office), IT and vendors to understand work and processes -in-place vs. delayed. Helped document and reengineered work streams to facilitate delivery of delayed deliverables and activities. Helped devise and execute work-around to overcome deficiencies in critical areas as well, as provide documentation, support and oversight in other areas such as; post implementation, training, data maintenance, on-boarding, performance and date-feed.

Project required understanding of; risk and exposure; trade-flow, desk and order management, exchange, platform, and asset class knowledge – a working understanding of setting-up/configuring [a] new [Trade] Order Management System (OMS) –Security Master; Broker, Trader Information, prime Broker, CITCO, Traded Securities, Broker Commission, Exchange Fee’s, Allocation, Destination Station Requests; FIX Messaging/Mapping, UUID, Data Feed, Pricing, Analytics, - and be capable of understanding/driving and helping create [a/the] workflow process for getting trades from the execution point, through the OMS, to the back-office (Citco) – resulting in an EOD file at night – and SOD file in the morning.

**GE Capital (Treasury) -** Stamford, CT Mar 2011 – Jul 2011
**Engagement Type & Environment:** Contract, Formal PMO, On/Offshore Operations, Strategic & Operational Risk Management,Vendor & Change Management (OCM)

**Industry:** Financial - Corporate Treasury
**Project:** (Implementation) Treasury Portal

**Role:** Senior Project & Resolution Manager / BSA / Agile Scrum Master, Coach and Mentor

**Project Methodology:** MS Project / Agile / SCRUM

**Project CORE / Workstreams:** CMS, UX/UI, Tibco, Word Press, SOA, Development, Omniture, Analytics, Wall Street On-Demand, Reuters, Google Appliance, LDAP, SSO, FX, Treasury Poles (Asia, Europe, USA), Commodities, Sovereign Risk, Short & Long Term Funding, Legal, Policies, Compliance, Finance and Risk Management, Business / System & Process Analysis / Reengineering, Development QA, Information & Data Modeling, Market Data

**Scope:** Structured PMO Environment. Retained by IT to take-over, oversee and articulate an end-state vision, leveraging Agile work and principals, while managing the ground-up design, development, and implementation of a NEW Treasury Web Portal and Content Management System (CMS) - using pre-selected technologies and 3rd party services *such as TIBCO, WordPress, Omniture, Wall Street ON-Demand, CNBC, Reuters, Bloomberg, etc.*

Planned and managed activities and conversations between the UX/UI [portal] design/development team, both on and offshore; and senior business / product owners *within the FX, Commodities, Sovereign Risk, Short & Long Term Funding, Legal, Policies, Compliance, Finance and Risk Management arenas****.***

Adhered to GE's strict PMO methodology; managing, delivering and communicating activities and plans directly to the various check-point steering committees - within a highly complex; phase driven PMO practice

Drove and managed activities including developed roadmaps, benchmarks, and frameworks around integration, security and data management; as well as development of UI/UX artifact, i.e. Style Guides, Wireframes diagrams, Mock-Ups, Scoping/Discovery notes and Portal/Wireframe inventory.

Managed testing, project reviews, feasibility, cost benefit analysis, prioritization, initiation, execution, internal and external communications, and closure for all project work related to the Treasury Business Interface program.

* Created and expanded operating frameworks with Architecture, Data Management and EDW teams to foster and promote well-integrated solutions
* Drove platform simplification and team collaboration
* Ensures compliance of application release management, outage management and change control processes and standards
* Responsible for creating and maintaining project documentation, including project charter, requirements, conceptual design, test plans, schedules, and presentations
* Oversaw application development (including both functional and technical design work)

**Blue Cross Blue Shield - Health Now,** Buffalo and Florida Sept 2010 – Feb 2011
**Engagement Type & Environment:** Contract, Formal PMO, Vendor, Risk & Change Management

**Industry:** Heath Care - Insurance
**Project:** (Multiple) - Automated Claim Adjudication (ACA), Other Party Liability Subscriber Information (OPLSI) and SmartPEND

**Role:** Senior BSA, Scrum Master, Coach and Mentor, Resolution & QA Manager

**Project Methodology:** MS Project / Agile / SCRUM

**Project CORE / Workstreams:** CMS, CRM, UX/UI, Business / System & Process Analysis / Reengineering, Automation, Development QA, Information & Data Modeling, Database Operations, SOA, Data Mining, Reporting and Portal Enhancements

**Scope:** Business/Systems Analyst for multiple projects -leveraging Agile work and principals - responsible for analyzing and accessing state of current artifacts to determine, plan and mitigate required work to complete deliverables to client and move into QA. Executed internal functional requirement and use-case audit/review to facilitate \ delivery of [accurate] technical design documents for built phase; facilitated discussions with [client] senior-leadership and stakeholder – to inform, elicit [information] and carryout exercises pertinent to the creation and refinement of artifacts. Heavy client-facing activities with development teams and senior stakeholders - oversaw planning of QA via HP Quality Center.

**Standard and Poor’s,** New York City Jan 2010 – Sept 2010
**Engagement Type & Environment:** Contract, Formal PMO

**Industry:** Financial - Credit Ratings Company (NRSRO)
**Project:** SEC Rules / New Policy Implementation - **Secure Website for Other NRSRO'S –** Strategic & Operational Risk Management

**Role:** Senior Program / Project Manager / Business Systems Analyst / Agile SCRUM Master, Coach and Mentor

**Project Methodology:** MS Project / Agile / SCRUM

**Project CORE / Workstreams:** SEC Compliance, Legal, Policy, Risk Management, CMS, Secure Website Development**, Data** Mining, Business / System & Process Analysis / Reengineering, Automation, SOA, Development, QA, Reporting, Information & Data Modeling

**Scope:** Engaged through project management office (PMO) to work with Chief Compliance Officer in providing, BA and PM support of IT and SEC compliance projects – via SPE (S&P Engineering) and Agile Scrum Master, Coach-Mentoring leadership/oversight.

Responsible for understanding and disseminating project [SEC] regulations being addressed; while providing clarification/direction of these to deployment team for strategic planning and alignment of initiative; responsible for capturing of information and data to assess stakeholder [project] vision – while facilitating project initiation, and commencement of SPE engineering cycle – as required for all projects by S&P PMO. Planned and execute BA/PM activities to coordinate the creation of [a] project proposal (e.g. scope, business case, risk, personnel, value, ROI, financial deck; etc.), to present, solicited and secure ‘full or “partial’ project funding from Rapid-Response-Team (RRT), comprised of Senior (S&P) Business and Technology Management Personnel (CIO, CTO, CFO, etc.) – Responsible for delivering, documenting and providing a consensus-driven, strategic road map for tactical deployment of all initiatives within the program portfolio; planned, solicited, interpreted and depicted pain-points into business requirements for development and execution of visioning session(s). Parlayed [all] captured information to develop and deliver 'structured' functional and technical documentation/drawings needed to assist in facilitating dialogues amongst stakeholders -and provided analysis through future state. Additional work included Joint Application and Requirement Development (JAD/JRD) sessions, BRD, FRD, FSD, UML, VISIO, Use Case and Requirement Modeling; Business Justification development, Feasibility Studies; Solution Assessment and validation; requirement planning and management; business process improvement documentation, and design-development of current and future state topology and/or business data (workflow) architecture.

**Dow Jones and Company,** Princeton, NJ. Sept. 2009 – Dec 2009

**Engagement Type & Environment:** Contract, Formal PMO, Vendor & Change Management (OCM), Strategic Sourcing, On/Offshore Operations

**Industry:** Media - Publishing and Financial Information Firm
**Project:** (Multiple) Market Data, HR Migration, Electronic Data Storage, Vendor, & Change Management, Strategic & Operational Risk Management

**Role:** Senior Program / Project Manager / Business Systems Analyst / Agile Scrum Master, Coach and Mentoring

**Project Methodology:** MS Project / Agile / SCRUM

**Project CORE / Workstreams:**  Strategic & ProjectOutsourcing, Vendor Management, RFP Development, **Contract** Negotiations& Development,Vendor Score Carding, POC, Selection and Project Appointment, Oversight & Management. Data Mining, PeopleSoft HR/ HRC/FMS, SAP FICO, Legal, Policy, Business / System & Process Analysis / Reengineering, Automation, Development, QA, Reporting

**Scope:** Engaged by the Strategic Sourcing, PMO division to spearhead and provide business analysis and steady state management of day-to-day [awarded] business, deliverables and vendor operations, while leveraging Agile SCRUM Master, Coach-Mentoring leadership, for multiple on-going BPO initiatives. Role entailed the oversight and management of initiatives on two fronts; **(1)** **BA Role**: The development and management of RFP competitive bid processes, procedures and campaigns to solicit responses from TOP tier vendors for the outsourcing of internal operation to an external entities; **(2)** **Project Management:** The oversight and management of activities, resources and multiple on-going projects, valued upwards of ***$25Million dollars***, to secure project plan compliance, contracted SLA deliverables, and smooth transition of operations from internal to external source(s). **Sampling of ongoing managed projects included:** HR (HRC) PeopleSoft Conversion and Data Migration, QA Testing, PeopleSoft and Chrystal Report Writing Campaign, Market Data Initiative, ERP (PeopleSoft, SAP), Outsourcing (BPO), Strategic Sourcing, Contract / SLA Preparation.

**Pearson**, Boston, MA Apr. 2008 – Sept. 2009

**Engagement Type & Environment:** Contract, Vendor Management, On/Offshore

**Industry:** Media - Publishing and Education
**Project:** (Multiple) - (Implementation) Revenue / Subscription Management System (SMS), eCommerce, CRM (SFA), CMS, Vendor / Product Selection & Management, Change Management (OCM), Strategic & Operational Risk Management

**Role:** Senor BSA, Program / Scrum Master, Coach-Mentor / Project and QA Manager

**Project Methodology:** MS Project / Agile / SCRUM / Waterfall

**Project CORE / Workstreams:**  Full- Lifecycle Project / System Implementation, SOA, Fulfillment, System Documentation & Decommissioning, Vendor/Product Selection, Data Migration & Mining, Oracle Financial (FICO), CMS, CRS (Sales Force), Business / System & Process Analysis / Reengineering, Automation, Development , QA, Reporting Vendor Management, Compliance (COPPA and PCI), eCommerce, Payment Processing, Accounting, Front & Backoffice Operations, SSO, Interactive Gaming & Educational Website, Mobile Application, Strategic, Tactical & QA Management

**Scope:** eCommerce / Subscription Management System Project - Engaged to devised and spearhead, while leveraging Agile Scrum Master, Coach-Mentoring leadership, end-to-end (strategic & tactical) initiative for the purposes of identifying ‘best-route’ to replace existing ‘content’ and ‘revenue / subscription management system for NINE (high-visited) premium gaming, educational and content websites; tasked with facilitating, interfacing and managing all front, middle and back office operations/information; including: content/database management, administrative tools, payment gateway, batch and sweep processes; web marketing and email tools; including PCI, COPPA & Corporate Security Compliance, API’s and interfaces to multiple 3rd party system/ services

Responsibilities would require and include – The development, facilitation and execution of all activities / roles required, of a Senior BA, PM, Strategic Sourcing Director and QA Manager during a full life-cycle of the project.

* **Program/ Project Manager:** ***$11M Budget*** - Facilitated, devised and managed the program project; all documentation and activities required of a Senior Program/Project Manager to commence and see through completion tactical phase of projects; including the management of both internal, external and vendor resources.
* **Senior Business & Systems Analyst:** Carried out all activities required of a BA to initiate project, establish a high-level requirement; drill down and document both a future state and business requirement document; achieved consensus for both information and plan of action.
* **Strategic Sourcing Director:** Devised and carried-out a competitive bid campaign, aimed at soliciting RFI responses, from vendors, to furnish product, resources and services for replacement of our existing subscription management system
* **QA Manager:** Facilitated, devised and managed the preparation of all documents and activities required of a QA Manager to commence and see through completion of a complex and comprehensive (end-to-end) QA effort; which would include; smoke, database, unit, interface, black box, integration, system. UAT and security testing. All efforts would be competed via both manual and automated fashion; using both ON and OFF shore resources
* **OTHER:** Assisted in the planning and execution of a NEW Data Warehouse; Scrubbing, Migrating and Validation of Data – as well, as the building and implementation of newly developed API’s and interfaces to numerous new/old systems and back office processes.
* **Agile Scrum Master, Coaching-Mentoring:** Leadership and oversight in the set-up and work within Jira, Confluence, and HipChat. Including User Story writing, estimation, release planning; end of sprint delivery vs. releases; product owner training, project re-architecting for agile initiative and testing within agile.

**GHI (Group Health Insurance)**, New York, NYDec 2006 – Mar 2008

**Engagement Type & Environment:** Contract, Formal PMO, Vendor

**Industry:** Health Care - Insurance
**Project:** (Multiple) - Ecommerce Web Portal Initiative – HTML to .NET Migration **-** Change Management (OCM) – Strategic & Operational Risk Management

**Role:** Senor BSA, Program Project and QA Manager

**Project Methodology:** MS Project / Waterfall

**Project CORE / Workstreams:**  System Documentation & Decommissioning, Data Migration & Mining, CMS, Business / System & Process Analysis / Reengineering, Automation, Development , QA, Reporting Vendor Management, Compliance , eCommerce, Payment Processing, Accounting, Front & Backoffice Operations, SS

**Scope:** eCommerce, Web Portal Initiative aimed at re/hauling and enhancing corporate web/internet portal and services for the purpose of increasing membership use (MOS) and Provider/Broker (POS) membership business activities. **Responsibilities include**: Migration validation from HTML to .NET platform; QA Testing, documentation of existing & desired ‘To Be’ ported functionalities; expanded member data collection processes, member incentive programs, provider bookkeeping, electronic enrollment verification process, improve electronic communication with members – and elimination of paper transactions for both members and providers. Led development and implementation of credit-card and check payment billing system for online and reoccurring check and credit card (membership) payment services – to include developing architecture, web-screen access, security, workflow and identifying/mapping of new and existing data sources.

**JP Morgan Chase**, New York, NYMay 2005 – Dec. 2006

**Engagement Type & Environment:** Contract, Global, Formal PMO,

**Industry:** Financial - Corporate Treasury & Banking

**Project:** (Multiple) Collateral Management **-** Cash, Derivatives, Securities and Broker Dealer, Change Management (OCM), Strategic & Operational Risk Management

**Role:** Senor BA/BSA, Project & Program Manager

**Project Methodology:** MS Project / RUP/ RAD

**Project CORE / Workstreams:**  Application & System Analysis & Documentation, System Audit / Decommissioning, Data Mining, Business / System & Process Analysis / Reengineering, Automation, Development, SOA, Reporting Vendor Management, Compliance, Front & Backoffice Operations

**Scope:**Global Collateral Management – BDAA Initiative (Business Development Application Architecture) – engaged to assist in **(1)** identifying, documenting and validating the ‘current state’ architecture, systems and work flow model of existing collateral management engines, for multiple business lines and operations, within the divisions of treasuries and securities **(2)** Analysis and reengineering of current state architecture, application(s), datastores and application data-flow, to document and provide blue-print for facilitating the building of a NEW ‘Future State’ consolidated (GCE) Global Collateral Engine, for the US (WHEM), UK (EMEA) and Asia (APEC) Markets **(3)** eliciting and documentation of all business requirements to help provide direction and delivery model for both tactical and strategic phases over the course of 3-5-year evolution.

**Other:** Heavy business analysis, information gathering, validation and assessment of current state architecture, systems, application data flow, functionalities, organizational pain-points, Cost of Ownership (COS) and numerous other areas, to include, the assessment and analysis of over **75 systems** and their individual functionalities. The uncovering and identifying of redundant, common and unique applications, to include; needed functionalities and business processes - shared across multiple business lines; collectively to provide for the ability to identify and provide recommendations consistent with consolidating, decommissioning, enhancing or decoupling functionalities of applications for driving new vision and frame-work of future state model.

**Education / Plus**

* BBA, Business Administration, Universidad de Puerto Rico
* Bilingual (Spanish) – Fluent