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Professional Summary

STEAM educator and management consultant with over 30 years of experience in applying technology to educational and business solutions. I have planned and managed large-scale initiatives, applying leadership, technical, and sales skills in delivering projects on-time and on-budget. Demonstrated success building high-performing teams (up to 100 members), effectively leveraging people, processes, and operations in complex and matrixed environments, while reducing operating costs and improving business agility and time to market. Conducted dozens of workshops, design thinking sessions, training courses, and academic courses for corporate, academic, non-profit clients, and schools, instructing and mentoring hundreds of students over thousands of hours of contact time.

Key Competencies

- **Leadership:** Expertise in building, developing, and leading cross-functional, hybrid, and remote teams of up to 100 members. Provides mentorship, structure, and insight to manage change, conflict, and uncertainty. Skilled at assessing stakeholder and team qualities of self-awareness, self-regulation, motivation, empathy, and emotional intelligence. Applies a servant-leadership philosophy emphasizing inclusivity and empowerment, through furnishing resources and granting authorities for success.
- **Management:** Proven ability to grow the business by managing programs from inception (formulating project approach, selling concept to executive team) through execution (staff upskilling/reskilling/repositioning, managing release train, measuring incremental value) to completion (driving client transition, knowledge management, and metrics adoption).
- **Technology:** Proficiency in leading data management and digital transformation initiatives in capturing market share, optimizing cost structure, and realizing new product capabilities. Skilled in judiciously applying standard methods (i.e., PMI, Agile SAFe, Lean IT, PMBoK, etc.) to meet time, effort, and quality standards. Experienced in the implementation of Cloud and DevOps frameworks; IT portfolio optimization within multiple domains including insurance (policy admin, claims, billing); calibration of CapEx/OpEx (FinOps); cloud-native development practices for speed-to-market; and automating infrastructure/ development environments.
- **Strategy:** Deep experience in collaborating with C-level teams envisioning and articulating strategic ideas, creating logical connections to actionable imperatives, defining measurable business outcomes (KPIs/OKCs), and developing operational, technical, and data management initiatives to realize business value. A recent 3-year, \$25M program applied this approach to reinvent the global operating and data model for an insurance client, resulting in reductions in CapEx, increases in product development agility/speed-to-market, and operational flexibility to support future M&A activity.
- **Domain expertise:** Extensive domain knowledge in financial services, education, and healthcare with > 30 years advisory and industry experience. Practices involve formulating data models and ontologies, applying business architectures for process improvement, implementing, and customizing leading admin and data management packages, and a strong understanding of current industry issues, challenges, and trends.

Professional Experience

Computer Systems Institute | 8/2023 – present

Adjunct Instructor | 8/2023- present

Focused upon instruction in the following areas:

Technology	Marketing	Business Administration
Office Systems & Administration	Principles of Sales and Marketing	Business Ethics
Computer Applications I	Global Business Perspectives	Employee Relations
Computer Applications II	Storytelling in Sales and Marketing	Organizational Behavior
Certification Courses in MS Word/Excel	Product Innovation	Applied Business Concepts
	Customer Service	Financial Accounting
	Selling Strategies and Content Marketing	Intro to Financial Services

- Delivered over 1,000 contact hours of instruction to hundreds of students, many of whom are English Language Learners.
- Performed administrative functions including attendance, grading, performance monitoring, etc.
- Utilized selected educational applications including Moodle, GradPro, etc.
- Collaborated with faculty on topics including AI, systems architecture, management science, project management, etc.
- Contributed to Program Advisory Committee by recommending six former colleagues, each with a strong interest in contributing to the quality of educational experiences at CSI.

LMS Administrator | 11/2024 – present (part-time)

Administration of the Learning Management System (LMS) for a postsecondary educational institution. Responsibilities include:

- Collaboration with Curriculum and Instructional Design teams to implement hybrid and virtual courseware through the LMS platform (Moodle and Articulate).
- Maintenance of integration with eLearning providers (McGrawHill, Cengage, CompTIA, Pearson, and others) to deliver eBooks, eLabs, and eQuizzes to students across a variety of academic disciplines.
- Incident and Problem Management for functional and technical issues related to Moodle and integration points with vendors using HelpDesk Pro.
- Development of survey instruments for faculty and students, collecting results, and creating scorecards for leadership using LimeSurvey.
- Earned Moodle Basic and Intermediate Administrator Certification.
- Design and data acquisition for KPI scorecards on LMS performance, usage, and service levels for senior management using Power BI.

Metropolitan YMCA of Chicago | STEAM Consultant | 5/2024 - present

Providing advisory and instructional services to a major non-profit in the Chicago area. Duties include:

- Collaborating with YMCA leadership to develop and instruct in STEAM camps for campers ages 6-8 and 9-13.
- Creating STEAM camp curricula using cognitive, kinesthetic, and written modes to explore topics in science, technology, math, and engineering.
- Mentoring campers in developing collaboration, negotiation, and conflict management skills.
- Developing the curriculum and performing project planning for a grant-funded project for urban youth to sustainably build urban greenhouses, to address food equity disparities in underserved Chicago neighborhoods.

BeamReach Technologies | Principal | 9/2022 - present

I formed BeamReach Technologies as a continuation of my many years as a successful management consultant, trainer/educator, and leadership coach. Its purpose is to engage with the people who will define the future of our society: our children, teachers, and administrators. My capabilities in leadership, technology, strategic thinking, and program management are proving valuable as a teacher, a curriculum developer, and as an educational researcher.

My core principles involve developing learning scenarios with five elements:

- Establishing the factors that support and promote the social aspects of learning (e.g., collaboration, communication, and respectful discussion).
- Encouraging the collective understanding of a learning scenario through referring to known facts, and the acquisition of new information, to think clearly about the scenario.
- Guiding the collaborative identification, refinement, and articulation of hypotheses toward explaining and predicting outcomes of the scenario.
- Providing structure for the analysis and verification of scenario outcomes based upon observation, thus assessing the strength of the hypotheses.
- Communicating findings and describing the process for establishing (or refuting) hypotheses and detailing next steps.

I find that this form of experiential learning and reflective practice was effective in my role as a consultant and strategic partner, particularly toward evaluating strategic alternatives and developing consensus on tactical direction. It is proving to be a useful and robust approach in schools, libraries, and civic settings.

Pricewaterhouse Coopers | Senior Manager | Chicago, IL | 8/2021-9/2022

Hired into PwC Insurance Transformation practice to provide leadership in delivering digital transformation projects; developing architectural solutions, standards, and principles; providing structured oversight to project delivery; and furnishing enterprise architectural consulting. Key accomplishments included:

- For a regional P&C carrier, identified savings in CapEx > \$3M by leading a matrixed team (> 25) through frameworks for Cloud strategy, DevOps, IT metrics, and FinOps. Performed maturity assessments, gap analyses, and road-mapping to arrive at target state consensus. Developed PoCs for Architecture-as-a-Service deployment (Maven), and Infrastructure as Code (AWS Cloud Formation).
- For a major group/voluntary insurer, led the technology work stream, resulting in an extension valued at > \$2M in billings. Led the redesign of business/technology processes, toward an event-driven architecture and an API economy in collaboration with over 60 agents, brokers, and stakeholders. Led the formation of an Agile Release Train and advised on its management and composition.

Cognizant | Associate Director | Chicago, IL | 12/2018-8/2021

I was a leader in Cognizant's Insurance practice with an annual pipeline > \$2B with personal goal of \$5M in advisory sales. Provided leadership in delivering digital transformation projects; developing architectural solutions, standards, and principles; bringing oversight to technical project delivery; and providing enterprise architectural consulting. Key accomplishments included:

- For a regional multi-product insurer, led technical workstream for a strategic marketing transformation. Participated as key technical advisor in leadership workshops to specify and prioritize capability enhancements toward meeting strategic objectives. Led an assessment of 41 marketing capabilities (i.e., Content Management, Campaign Management, Personalization, Analytics, Attribution, etc.). Designed a technical architecture, using Salesforce Marketing Cloud as one of the core technologies, to align to new capability requirements. Launched pilot programs to demonstrate and validate technical innovations, and reviewed outcomes with key stakeholders. Project realized efficiency gains of over 30% while reducing costs over 40% in the first year.
- For a major L&A and group insurer, led technical workstream (>25) to deploy digital product development ecosystem, delivering net savings of > \$3M/year. Led workshops to define target data architecture and to reengineer core admin and claims processes, and designed a trusted information model to unify ontology, semantics, and concepts across more than 60 legacy platforms. Developed design for integration fabric to standardize the API economy for internal and external users.
- For a global mutual L&A insurer, identified cost savings of > \$2M/year by leading an architecture team (> 12) through re-design/platform all ITSM capabilities of six business units using a Prevent and Predict operating model. Managed deployment into ServiceNow using RPA and proprietary accelerators and tools (SmartOps).
- For a global multi-product insurer, led the technical workstream to develop a Marketing Hub capable of replacing existing processes and technologies with cloud-based, modernized technologies. Collaborated with strategists and client leaders to chart future state marketing landscape. Led review of marketing capabilities (i.e., Campaign Management, Content Management, Digital Experience, Data Management, Analytics, etc.), and their technical enablers. Led development of multi-year roadmap for phased deprecation of legacy marketing technology, replacing it with modernized a component-based design using API architectural style (involving Adobe Marketing Cloud). Launched pilot programs to demonstrate and validate technical innovations, and reviewed outcomes with key stakeholders. Performed cost-benefit analysis on phased approach with Capex savings of over 50% in the first year.
- For a domestic L&A and health insurer, identified cost savings of > \$20M over five years (CapEx reduction + outsourcing initiatives) by leading technical team (> 10) to reengineer and automate document management capabilities. Optimized inbound/outbound billing/claims document processes and led design thinking with leadership to determine growth/cost drivers for target state.

IBM | Senior Cloud Architect | Chicago, IL | 6/2013-12/2018

I was a leader in IBM's Cloud Center of Competency, with an annual pipeline of over \$750M with personal goal of \$3M in sales and \$3M in project management. Provided leadership in delivering Cloud Assessment projects, developing Cloud Architecture standards and principles, overseeing Cloud migrations, and in providing enterprise architectural consulting. Key accomplishments included:

- For a multi-national energy firm, developed a two-year > \$20M migration plan as technical leader of digital transformation through Azure. Assessed technical maturity (security, data, integration, etc.), assessed workloads for cloud-readiness, and devised migration plan. Authored playbooks to guide IaaS/PaaS design, SaaS vendor management, and Cloud Management (brokerage, AI/ML, FinOps).
- For a major bank, established development frameworks accelerating time-to-market by over 40% and reducing API defects by 80% by leading a technical team (10+) toward establishing uniform development methods for API/microservices development. Facilitated expansion of API development to offshore sites. Executed PoC demonstrating OAuth2 security in a microservice-based ecosystem.
- For a global energy company, led the technical workstream for cloud-based digital transformation of marketing and HR areas. Assessed legacy mainframe marketing and HR workloads, decomposed technical capabilities, and proposed 18-month migration into cloud platforms based upon Salesforce using AWS. Implemented cloud management platform to measure process and economic impacts of migration. In the first year, generated Capex savings of over 40%, Opex savings of 20%, and efficiency gains of over 30%.

Senior Enterprise Architect

- For a global reinsurer, identified > \$2M in savings over two years through accelerated error-free development and improved time to market as a lead solution architect (two-in-a-box with client VP), managing matrixed global team of 60 developers. Authored position papers on integration fabric, API economy, DevOps, security, data/analytics, and cloud. Deployed tooling or DevOps and devised metrics to observe/manage outcomes.
- For a global group insurer, identified CapEx savings of > \$2M with reduction in operational spend of > 30% as a lead architect for a cloud-based modernization program for enrollment, claims, and billing. Analyzed DBaaS options and led client toward transition plan using Cloud database platform. Established a Cloud CoE to curate standards and practices, provide education and mentorship, and foster business engagement.

Prior Experience – Deloitte (2/10-5/13), Allstate (8/06-12/09), BearingPoint (2/02-7/06), KPMG (8/97- 7/02)

- Held leadership, management, and technical roles in programming, network design, database management, web development, team building, and internal/external consulting.
- Led the formation, rollout, and maintenance of architectural methodologies and training courses for practitioners, and client development of Centers of Excellence for architecture and cloud methods, and practices for technical and business outreach.
- Developed expertise in technical writing, presentation creation and delivery, and graphics techniques for documentation, sales, and knowledge management purposes.

Education

University of Iowa, Master of Science in Teaching and Learning Sciences – Emphasis in STEM Education

- Course work included Educational Psychology, Learning Sciences (Design of Instruction, Tools for Online Teaching), Instructional methods (Math, Physical Science, Biological Science, Computer Science), Experiential Learning, and STEAM Research.
- GPA = 4.07 / 4.00

University of Iowa, Bachelor of Liberal Studies (Organizational Studies)

Northwestern University, Major: Computer Science (non-degree student)

Competencies

- **Educational and Instructional Design** (Moodle, Canvas, Articulate, GradPro, UDL, UDI, ADDIE)
- **Content and document management** (Adobe Experience & Photoshop, Canva, Quadient Inspire, Documaker, EMC Captiva,)
- **Project Management, quality, and governance** (PMI (PMP Certification (inactive)), Lean IT Foundation Certification, ITIL (Certified v3), Six Sigma Green Belt, FinOps Certified Practitioner (coursework only), Kanban)
- **Agile** (SAFe Product Owner/Product Manager (Certification), scrum leadership, backlog estimation and grooming, sprint allocation, burndown management, architectural runways)
- **Microsoft** (PowerBI, Azure, .NET, VB.NET, C#.NET, Windows Server, SQL Server, Office365, SharePoint, Entra (AAD, AADDS))
- **Other languages** (Java/JEE, JavaScript, C, C++, Python, PERL, PHP)
- **Open source** (LAMP (Linux, Apache, MySQL, Python), MAMP, Kafka, NGINX, Simian Army)
- **Data management** (Oracle 11i, Sybase, IBM Cognos, Hyperion, Azure Streaming, Azure SQL, Azure Cosmos DB, AWS S3, AWS Lake Formation, Tableau, Qlik, Splunk)
- **IBM products and technologies** (APIConnect, AS/400WebSphere, MQ, JEE, Architectural Methods, Design Thinking, Cloud Architecture, IBM/Rational Rose, ClearCase, Telelogic, Rational Method Composer)
- **Architectural methods** (UML, Model Driven Architecture (MDA), Design Patterns, TOGAF, Zachman), architectural tools (Rational Architect (IBM Certified), Rational Method Composer, ArchiMate, Troux, Sparx), and estimation models (COCOMO, FPA, and Bayesian methods)
- **Cloud technologies** (IBM Experienced Cloud Architect, Microsoft Azure Solution Architecture, AWS Management Console, AWS CloudFormation, Azure Portal, Azure Active Directory, Azure Edge)
- **CRM/Marketing Technology/Automation platforms** (Salesforce, Adobe, SiteCore, Pegasystems, ServiceNow, SAP, Apttus)
- **DevOps** (GitLab/GitHub, Ansible, Chef, Puppet, AZM, Terraform, Maven, Jenkins, Docker, Kubernetes, Atlassian/JIRA)
- **Security standards** (NIST SP800/1800, ISO 270xx, COBIT, CSA)
- **Financial and healthcare standards and models** (ACORD, IBM IIW/IFW, FIBO, FIB-DM, SNOMED, HL7, ICD-10)
- **Business architecture** (BPMN, BPEL reference libraries, capability models, repositories)

Professional Affiliations

- **Member, Association for Supervision and Curriculum Development (ASCD)** (2023 – present)
- **Member, International Society for Technology in Education (ISTE)** (2023 – present)
- **Member, Institute of Electrical and Electronic Engineers (IEEE)**; IEEE Chicago working group (2018-present); Education Society Group (2018 – present)
- **Member, Association for Computing Machinery (ACM)**; Special Interest Group in Computer Science Education (SIGCSE) (2022 – present)
- **Member, Object Management Group (OMG)**; Finance and Insurance Metamodel Working Groups (2005-2010)
- **Member, Association for Cooperative Operations Research and Development (ACORD)** (2011 – present); Component Model Working Group (2011-2013)