

SUMMARY:

My clients call me for advice and help long after my assignment is complete. Why? Because I'm organized, articulate, down-to-earth, and a realist. The plans I develop for clients reflect my practical approach. The plans developed are based upon successful negotiation between some of the more challenging groups. My defined processes have been accepted as the standard for many Fortune 500 companies. I'm tenacious with a smile in achieving goals and working out solutions that is in the company's best interest. I improve the communication experience between business personnel and technologists because I can speak both languages.

AREAS OF EXPERTISE:

BUSINESS AREAS:

My clients and successful projects have exposed me to many of the following business application categories:

Financial: Banking, Brokerage, Reinsurance, Trading/Clearing, Foreign Exchange, Medial Claim Processing, Life Insurance

Executive Analysis: Business Intelligence, Decision Support, Organizational Effectiveness, Data Warehousing

New Business: Product Development & Deployment, Discounting, International Tarriff

Customer Services: Contract Management, Marketing Effectiveness, Customer Relationship Management

Electronic Search: Documentation Management, Selection, Reading, Distribution, Royalty/Copyright Processing

Transportation: Logistics (government and private), distribution

Auction: Sales, Process and Warehouse Control

Government: NYC Reimbursement Process, Criminal Tracking & Maintenance, Traffic Light System of NYC

METHODOLOGIES & BEST PRACTICES:

I have experience with many of the top and most commonly used methodologies and techniques. I will work with any standard your company currently promotes or teach your staff in what would be the best fit for the project. Categories include:

Strategic Planning

Includes: Organizational, Task Deployment

Business Process Architecture

Includes: Business Re-Engineering, Model Driven Development, Data Warehouse, Business Intelligence

Requirements Engineering & Management

Includes: Analysis (Object, Data & Process)

Project Management and Oversight

Includes: Plan Development for local, domestic, and global teams

Process Improvement

Includes: CMMI

TYPE OF TOOLS OF THE TRADE:

I have used many of the top and most commonly used tools. I will work with any software products your company currently promotes in the area of:

- Project Management & Tracking
- Requirements Engineering & Management
- Business Intelligence
- Graphic Modelling & Design
- Office Products

EXPERIENCE:

(overlaps are due to supporting multiple clients on a part-time basis)

KEYNOTE SPEAKER & AUTHOR (Strategic Business Decisions, inc. 08/2007 – 12/2008)

Management Consultant (current activity listed)

Responsibilities Included:

- Issue a bi-weekly eZine on improving Business and Information Technology relationships.
- Post to a Blog on Rules of Engagement to reach project managers and business analysts on how to engage the business community.
- Post to a Blog for the business community on how to talk with technologists.
- Developed speaking modules to be customized for specific Business or Information Technology audiences.
- Interviewing mid- to senior executives on the application successes over the last 3 years.
- Developed ½ Seminars for Jeremiah Associates LLC (www.jeremiahassociates.com)
- Started my 3rd book tentatively titled The Rules of Engagement. Includes material from interviews with 200 top executives.
- Mentoring specific clients on improving the business relationship and business intelligence.
- Coaching managers to achieve their certification from PMI.
- Speaking to Information Technology groups (company and associations) on Engaging Business. Including PMI & IEEE.
- Speaking to business organizations on how to get more from Information Technology groups.

GOVERNMENT (NYC Dept of Edu 07/2008 – 10/2008)

Business Process Architect

Responsibilities Included:

- Identified opportunities to improve the current Reimbursement from NYS for NYC Special Needs Students.
- Reviewed current Student Tracking databases and NYC contract financial systems to create a data mart for NYS Reimbursement.
- Recommended interface process and procedure enhancements between NYC and NYS.
- Educated the Division of Revenue Operations management procedures to facilitate information technology efforts.

MEDIA CLIPPING COMPANY (BurrellesLuce 01/2006 – 07/2007)

CIO Assistant & Project Management Coordination

Responsibilities Included:

- Developed an organizational strategy for the maturing IT department
- Developed Project Management processes and trained managers and developers
- Managed a group of Project Managers (IT & Business Departments) to plan and implement a major upgrade to a highly-specialized system.
 - Developed an Implementation Plan.
 - Coordinated key activities for business and IT (software and network infrastructure)
 - Developed a comprehensive test strategy, plan, and cases
 - Coached new quality analysts on the development of test cases
- Developed presentations and reports for senior executives on progress
- Involved assisting executives with strategy development and validation of business policies, rules, and process efficiencies.
- Conducted requirements gathering and tool evaluation but Business Intelligence tools (Business Objects, Cognos, FAST, MS Sql Server 2005).
- Interviewed company executives to develop a strategic business intelligence monitoring and measurement system to help the business transition in a new and profitable direction.
- Included the continual coordination between systems and data center for project implementation.
- Developed strategies for implementing new departments and processes within the IT divisional framework.
- Designed a Royalty/Copyright Data Warehouse for executives.

MAJOR AUCTION HOUSE (Christie's 08/2005 – 11/2005)

Business Process Architect

Responsibilities Included:

- Managed a group of Business Analysts to elicit high-level business requirements that would enable the company's executives to
 - Determine the impact of a new business strategy.
 - Develop a gap-analysis between existing, in-development systems.
 - Re-evaluate the validity of age-old business policies and rules.
- Coached new managers on the technical and intangible skills required to be an effective manager.
- Developed presentations for senior management on requirements process.

MAJOR NEW YORK BANK (JP Morgan Chase 01/2005 – 06/2005)

Program Management

Responsibilities Included:

- Managed a group of Business Analysts to elicit business requirements and develop specifications to convert Asset-Based Loans from existing systems (currently residing on multiple vendor systems under both heritage banks).
- Coached new managers on the technical and intangible skills required to be an effective manager.
- Plan effort and track to the requirements and stages of the defined process.
- Developed presentations for senior management on suggested approaches and adjustment to timelines.

CONSULTING COMPANIES (To The Point Consulting 03/2004 – 01/2005)

(x-Change Technologies 01/2002 – 02/2002)

(Neighborhood Connect 06/2002 – 02/2004)

Strategist / Business Process Architect

Responsibilities Included:

- Researched the feasibility and estimated the profit making point for a new retail company. Results were compiled into a detailed business case.
- Interviewed several customers across the US, Canada, and Europe to plan new products and company direction.
- Researched, evaluated and implemented the right business partnership for assorted business processes. Created an end-to-end business process and procedures for the company.
- Reviewed marketing material for clarity and customer focus.
- Initiated Customer Relationship Management procedures and an email-specific target strategy.
- Evaluated deliverables for a target customer-base for completeness, clarity, and need.
- Developed seminar to stimulate Small Business customer growth for IT support.

GREETING CARD COMPANY (Scarlet's Feathers 01/2002 – 04/2008)

Business Process Architect

Responsibilities Included:

- Researched and developed a business plan based on two large industry information.
- Helped design products.
- Assisted in defining CRM strategy.
- Assisted in developing a web strategy.
- Managed development effort and product launching.
- Developed a communication strategy.

MAJOR NEW YORK BANK (Bank of New York 11/1998 – 06/2004)

Program Management / Requirements Architect / Process Improvement Specialist

Responsibilities Included:

- Evaluated and selected solution providers to validate, demonstrate, build and implement a new Government Clearance system
- Prepared for the start of the initiative preparing documents that would facilitate the project success while complying to CMMi Level 3 audits.
- Planned the initiation of bank wide program which initiated 16 separate projects in the Messaging and Government Securities Clearance Systems.
- Assisted with bankwide conversion of older technology.
- Managed the requirement engineering effort for a mission critical new line of business application. Required interfacing with bank executives, legal, and IT organizations.
- Mentored employees on requirements engineering techniques for large and small projects.
- Assisted in assisting in the development of a conversion plan from one application to another.
- Assisted in developing a Project Office Process for two divisions.
- Developed a Tools Strategy for Requirements for two divisions.
- Developed a configuration strategy for requirements (including globally elicited requirements). Included using assorted CASE tools, MS tools and CCC/Harvest for version control.
- Assisted with planning a Data Warehouse strategy.
- Assisted with implementing a Data Warehouse for a Clearing Services domain.
- Assisted with the use of Platinum Technology tool set.
- Established a new software process for a newly purchased division. Included training in software process improvement and requirements engineering techniques.
- Reviewed Requirement Management tools.
- Introduced Six-Sigma concepts.
- Educated process auditors on Sarbanes-Oxley and CMMi coordination activities.

GOVERNMENT AGENCY (Indiana Department of Corrections 03/1998 – 05/1998)

Process & Data Warehouse Specialist

Responsibilities Included:

- Assisted with the use of Platinum Technology Process Engineer (LBMS/PE).
- Coached in the use of metrics including the development of task level formulas.
- Developed a Data Warehouse process. Sub processes included:
 - Business Rule Requirement Elicitation.
 - Incremental Implementation.
 - Package Selection.
 - Task Scenario Based Testing.

MAJOR INSURANCE COMPANY (New York Life 03/1998 – 08/1998)

Project Office & Y2K Specialist

Responsibilities Included for Client Server applications:

- Assisted in defining the testing process for multiple platforms and applications.
- Assisted in defining Software Configuration Management (SCM) process.
- Assisted with defining Risk Management procedures.
- Assisted planning the Y2K Client Server effort.
- Assisted certifying Y2K Client Server compliance.

MAJOR INSURANCE COMPANY (Prudential 09/1997 – 02/1998)

Process Analyst

Responsibilities Included:

- Assisted developing the Requirements Management Process that conforms to the Key Process Area of Level 2 of the Capability Maturity Model.
- Reviewed and developed a recommendation to improve the current process for individual projects (Business and Information Technology organizations).
- Assisted managers in learning project management planning skills.
- Assisted business analysts in gathering and analyzing business software requirements.
- Assisted identifying essential work products that will improve the software deliverable.

DISCOUNT BROKERAGE FIRM (Sherwood 06/1997 – 08/1998)

Business Analyst

Responsibilities Included:

- Analyzed and documented Business Model including Process Model, Data Model, Data Dictionary.
- Documented current operation procedures.
- Evaluated CASE tools.
- Built business case for improving the application development process using the Capability Maturity Model (Software Engineering Institute, Carnegie Mellon University).

MAJOR VEHICLE MANUFACTURER (Jaguar 02/1997 – 06/1997)

Methodology Advisor

Responsibilities Included:

- Built the infrastructure for the CASE environment.
- Developed a training guide for new users of the Select/LBMS Systems Engineer case tool.
- Assisted analysts in the development of process models using Event Partitioning methods.
- Reviewed data models and process models from a quality control perspective.
- Assisted with interpreting CMM and ISO9000.

MAJOR INSURANCE COMPANY (American Insurance Group 06/1994 – 12/1995)

Senior Business Information Systems Analyst

Responsibilities Included:

- Developed a deliverable structure and project plan for a targeted Object Oriented/Procedural/Client-Server implementation environment for the Domestic Insurance Reengineering Project.
- Developed current and essential Reinsurance Business Model which involved the interviewing of key high-level business executives and other personnel.
- Developed system design and program and window specifications for Contract Generation/Reinsurance including DB2/6000 database design.
- Coordinated Data Modeling efforts and designed the Physical Data Model for the Reinsurance business area.
- Trained Programmer Analysts and Business Analysts in Business Analysis including data modeling, event modeling, and the use of LBMS.
- Trained management level personnel in MS/Project.
- Managed the installation and integration of a imaging system using Frequent Filer and SQL/Server.

MAJOR NEW YORK BANK (Chemical Bank 01/1994 – 06/1994)

Project Management Consultant

Responsibilities Included:

- Developed a project plan template to assist in identifying key tasks for re-engineering efforts.
- Trained Assistant Vice Presidents and Vice Presidents in project planning techniques.
- Evaluated LBMS/PE tool and methodology for a Private Banking application.
- Coordinated and coached managers in developing a division wide project plan.
- Developed a documentation guide on suggested documentation to include during different project life cycle phases.
- Developed a testing life cycle process for the National Deposit System.

MAJOR TRANSPORTATION SERVICES COMPANY (UPS 03/1991 – 01/1994)

Senior Business Analyst

Selected Accomplishments Included:

- Designed and implemented a new Incentive Pricing Structure including re-engineering the business process, logical and physical design of the relational database, project planning, client/server partitioning, test plans, selection and loading of test data, SQL tuning, training and deployment.
- Designed Marketing Applications pertaining to Forecasting, Incentive Administration, Logistics and Volume Change Analysis.
- Completed several Feasibility Studies for the Marketing Department including Cost Benefit Analysis for a Decision Support System.
- Trained Project Leaders and Project Managers Structured Systems Analysis, Project Planning, and Structured Testing techniques.
- Trained Junior Business Analysts on Essential Analysis, Logical Data Modeling and Project Estimating & Planning.
- Evaluated Objected Oriented Analysis/Design courses for internal use.

RELATIONAL DATABASE COMPANY (Teradata 04/1989 – 01/1991)

Senior Systems Engineer

Selected Accomplishments Included:

- Primary Support for day-to-day activities at a major bank and a stock/bond clearing house.
- Lead personnel in problem resolution for both the Teradata DBC/1012 and Teradata/Filetek Optical Storage.
- Designed and Implementation of Data Capacity Planning Model for a major Health Insurance Company.
- Developed a logical/physical model from enterprise model for a major Health Insurance Company.
- Proposed a new "House Holding Algorithm" for a major bank.
- Lead weekly user meetings to assist major bank in solving business questions using SQL.
- Prepared and presented several presentations on the Teradata Technology.
- Wrote several documents covering SQL interpretation and DBC/1012 monitoring and recovery procedures for a major bank.
- Lead planning effort for major software upgrades and hardware conversions.

MAJOR NEW YORK BANK (MHT 10/1987-04/1989)

Assistant Vice President

Responsibilities for the planning, designing, scheduling and hiring of technical personnel for two departments.

Development Environment responsibility's included:

- Established an Advanced Development Center that proposed, evaluated, and implemented CASE (PC- and HOST-Based) tools to support the entire development life-cycle.
- Consulted other areas in the bank in determining which tools would "best-fit" their methodology/organization.
- Planned and managed \$500k software budget for sector.
- Developed an Application Test Strategy which stressed a four phase test environment. This was comprised of different vendor hardware and software.
- Instituted an Application Technical Support Team to support application development.
- Developed an IBM Standards Document for application development.

Data Management responsibilities included:

- Defined and staffed a Data Management Team
- Developed a Data Strategy incorporating DB2 and the System Application Architecture (SAA).
- Managed technical personnel in developing Database oriented systems from data planning to implementation using Information Management, Structured Systems Analysis and Human Factors Engineering techniques.

MAJOR BROKERAGE FIRM (Paine Webber 02/1987 - 10/1987)

Project Manager

Managed a database development group in the Financial Systems area.

Responsibilities included:

- Managed an enhancement effort of an existing on-line database inquiry system for top financial personnel.
- Lead Project Leaders through the project development cycle on the management hierarchy interface system.
- Lead personnel through a design effort, using data models and flows, of a corporate financial database encompassing all back office information.

MAJOR COMPUTER VENDOR (IBM 06/1977 - 02/1987)

Account Systems Engineer

Selected accomplishments included:

- Controlled installation of new SQL/DB2 at customer locations (VM/MVS based).
- Team Specialist for SQL/DB2 and CICS Team Specialist.
- Trained Systems Engineers.
- Acted as Lead Systems Engineer for the installation of 3725's, 4361's, and 3090's.
- Lead a VSE/SP to MVS/XA conversion project.
- Directed an Early Support Program for SSX/VSE operating system, published articles following field test.
- Designed, programmed, and implemented a DEC to BASIC-Plus conversion aid, published a technical manual for same, acted as Project Leader.
- Designed and programmed an on-line Traffic Control System (MVS based).
- Programmed an on-line Publication Order/Subscription System (VM based).

CURRENT SEMINAR OFFERINGS:

- Communication With Geeks (targeted to the business community)
- Rules of Engagement (targeted to the Information Technology Community)

PUBLISHED WORKS:

- eZine *Rules of Engagement*: mailed every other week to IT personnel about how to engage the business community from beginning to implementation. Targetted book for Fall 2008.
- Update 2 blogs regularly <http://sbditipsblog.wordpress.com> (IT Focused) & <http://communicatewithgeeks.wordpress.com> (Business Community Focused).
- Other existing tips on Project Management & Requirements Engineering (www.SBDi-Consulting.com/archive.shtml).
- Seven Steps to take Before Starting a Greeting Card Company, June, 2005.
- *A Requirements Pattern: Succeeding in the Internet Economy*. AWL (11/01).
- "Are Your Requirements Complete," *Software Testing and Quality Magazine*, October, 2000.
- "Facilitating Communication," *IEEE Software*, September/October, 1998.
- *Interpreting Technology for Business: Data Warehousing, Advice for Managers*. New York: AMACOM Books (a division of the American Management Association), December, 1998.
- *Ace the Technical Interview: 3rd Edition*. New York: McGraw-Hill, March, 1998. "What You Should Know (And Do) To Succeed on an Interview for a Year 2000 Project Manager," Chapter 3 & "What You Should Know (And Do) To Succeed on an Interview for a Year 2000 Quality Control Analyst," Chapter 4.
- *Ace the Technical Interview: Revised*. New York: McGraw-Hill, April, 1996. "What You Should Know (And Do) To Succeed on an Interview for a Project Manager," Chapter 2;
- "Reengineering with the Right Types," *Software Development*, July, 1994.

VERBAL COMMUNICATION SUCCESS:

- Seminar Offering: Are You Asking the Right Questions?
- PMI Westchester Chapter Meeting on Engage with Storytelling, June, 2008.
- ½ Seminar for IEEE Software Symposium on Rules of Engagement scheduled for October, 2008.
- Toastmaster Humorous Competition Finalist at the top level, August, 2006.
- UML World: Requirement Patterns, June, 2000.
- ICRE2000: Requirement Cube Model, June, 2000.
- InDOORs International User Conference: Requirement Allocation, July, 1999.
- DOORs Seminar: Requirements: Preparing for the Demand, May, 1999.
- AMA Forum: Data Warehousing for Managers, February, 1999.
- GIGA Information Group Expernet Expert for Requirements Engineering & Management, CMM, Process & Project Management, Year 2000, Data Warehouse.
- GIGA Information Group Expert Teleconference December, 1999: "Requirements: Diamonds in the Rough."
- LBMS User Conference, September 24, 1997: "Process Management After the Breakthroughs."
- DCI Compuserve Forum Study Group (CASEforum), March, 1996: "Understanding Your Business Users."
- LBMS User Conference, September 26, 1995: "Team Communication Strategies."
- Data Administration Management Association (DAMA) New York Chapter, May 18, 1995: "Communicating the Logical Data Model to Business Users."
- Software World Workshop, March 1, 1995: "Strategic Communication for Reengineering."

EDUCATION, CERTIFICATIONS:

PACE UNIVERSITY: B.B.A., Computer Science/Education (6/77)
Myers-Briggs Type Indicator (MBTI™) Qualified 11/94
Toastmasters International: Advanced Communicator (Bronze) (6/08)