



Profile

Trilingual senior Program and Project Management professional who functions successfully as a business partner and consultant to identify and institute best practices to enable organizational transformations with success. Viewed as a strategic and trusted management team member by senior executives and a capable manager and developer of people. Solid track record of success performing in fast paced, dynamic, and creative organizational environments.

Qualifications

- Certified Project Management Professional (PMP)
- Solid record of successful project Implementations
- 30 years of Business experience
- Project Management (General business, Computer software, Computer Technology, Infrastructure management)
- Business Analysis
- Diverse industry experience: 20 years in Financial Services, 10 years in sectors including Sales/Marketing, Higher Education, Software Solutions, Transportation, Telecom
- Software applications (Business Case, Full cycle of Implementation)
- Management (including C-level senior management)
- Agile Project Management Certificate
- Proven successful team leadership
- Certified Internet Professional
- Certified eBusiness Professional
- Windows, Mac specialist
- Multi-lingual: French, English, Spanish

Competencies

- | | | |
|-------------------|-----------------------|-------------------------|
| ✓ Business Acumen | ✓ Resource Management | ✓ Influential |
| ✓ Initiative | ✓ Team Oriented | ✓ Multi-tasking |
| ✓ Analytical | ✓ Team Building | ✓ Multi-lingual |
| ✓ Motivated | ✓ Organized | ✓ Verbal Communication |
| ✓ Creative | ✓ Motivated | ✓ Written Communication |

Professional Experience

CIBC – September 2013 – September 2019

Program/Project Manager (contract), Mobile Sales Force, National Sales – Retail Banking division

Program and Project delivery – managing strategic Business initiatives and transformation of sales force compensation. Project delivered:

- Mortgage Advisor Compensation Plan Restructure - implemented a national restructure of the compensation plan for Mortgage Advisors across Canada to provide enhanced sales incentives and compensation.
- Home Loans Canada – Mortgage Options Specialist – restructured company to enhance profitability and to provide a seamless alternative mortgage solution (B-business) for clients that do not qualify for CIBC Bank mortgages
- Replacement of legacy IBM mainframe application to outsourced cloud solution, national sales force web portal

Key accountabilities

- Managed Project and Project Teams across CIBC and Home Loans Canada divisions (Mortgage products, Insurance, Retail, Technology/IT)
- Define project charter/objectives including scope, costs and quality levels with sponsor and stakeholders. Monitor project delivery to ensure intended objectives are met.
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- Accountable for project definition including preliminary cost estimation and project scoping. Conducted presentations to senior management for final project approval.
- Leading teams (internal and external) during project evolution and challenges
- Managed various project management tasks which included vendor relationships, project management, change management, risk management, issue resolution, issue Escalation, operational Processes and budget Management
- Developed, executed, monitored and implemented consolidated project plans using Microsoft Project.
- Identify project risks and proactively develop contingency plans to mitigate the risks
- Conducted project status meetings with project teams and managed project deliverable status, issue resolution, conflict resolution, resource requirements/constraints, project risks
- Managed budgets (last project \$12M)

B2B Bank (Division of Laurentian Bank) - August 2007 – April 2013

Project Manager (contract), Business Solutions

Project delivery and managing multidisciplinary aspects of assigned initiatives ensuring compliance with corporate strategies, budget requirements and communication with stakeholders and ensuring that resources complete tasks on time while mitigating organizational risks. Projects delivered:

- From a Trust to a Bank - implemented a company restructure from trustee (B2B Trust) to bank (B2B Bank). Improved alignment of the company brand and corporate market positioning. - \$5M budget, team of 150.
- Online Investment Loan Application and Workflow automation. Enhancement in operational effectiveness by converting manual processes to automated including error reduction in processing. Budget: \$2M
- Internet Portal Operational Enhancement - recommended and implemented enhancements to the Internet loan portal to enable 100% dealers/advisors access the portal. Budget: \$1M

Professional Experience (continued)

- Compliance upgrades - enhancements to conform to regulatory obligations including Anti Money Laundering (AML).
- Managing General Agents (MGA) channel expansion - Strategic and efficiency project to expand distribution channel
- FundSERV eBusiness - implemented annual FundSERV electronic commerce standards upgrades. Budget: \$500K
- Imaging and Workflow reporting - Implemented a Global 360 Managerview reporting tool for management reporting of corporate imaging/workflow application. Budget: \$500K
- Fund Validation automation and workflow - Created and implemented a mutual fund loan eligibility service to validate fund purchases from Internet loan application and FundSERV trades to reduce errors as well as enhancements to workflow components. Budget: \$1M
- Software application enhancements - Implemented corporate software upgrades to enhance edits to reduce transactional errors and provide enhanced operational efficiency. Budget: \$500K

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- Identify project risks and proactively develop contingency plans to mitigate the risks
- Conducted project status meetings with project teams and managed project deliverable status, issue resolution, conflict resolution, resource requirements/constraints, project risks
- Managed budgets
- Communicated weekly and monthly project status to sponsors, stakeholders, and Steering Committee through status meetings and progress reports (overall project status, financials, issue escalations, risk management, quality control, resources)
- Authored and reviewed written documentation – Scope definition, Statement of work, project charters, business analysis specifications, and recommendation reports, Integration management plans, Scope management plans, Schedule/Resource management plans, Quality control plans, Communication plans, Risk management plans and Procurement management plans.
- End-to-end accountability of project deliverables including all aspects of the organization – operations, process and documentation, forms management, marketing, sales, legal, compliance, human resources, technology, training
- Worked with selected vendors to define technical and non-technical requirements. Reviewed vendor proposals, project plans, system specifications and implementation strategies. Managed outsourcing budgets.
- Learned/reviewed software and processes as required
- Lead training teams to provide required training to staff for new functionality introduced in systems/procedures
- Managed compliance obligations – internal compliance policies as well as financial regulatory bodies (OSFI, MFDA, AMF). Projects included components for controls on anti-money laundering, know-your-client and general regulatory reporting at the provincial and federal levels.

Professional Experience (continued)

George Brown College - 2003-2007

Business Analyst - Project Manager (contract) – School of Business & Financial Services

Operational process analysis and software application enhancements and implementations. Roles included Business Analysis, Project Management, Management of Student Services & Co-op. Responsible for overall project management as well as business analysis. Projects included:

- Represented all academic divisions to upgrade the ERP software 'Banner' from version 4 to version 6. Collected business requirements from individual academic divisions, documented GAP analysis and presented recommendations. Lead the project team during the execution and implementation. Implemented quality control procedures.
- Managed Enhancement of the Student Self-Service module (StuView) application interface to improve registration accuracy/efficiency. Developed and executed a project plan. Conducted Business Analysis, documented business analysis requirements, presented the recommendations and implemented the solution. Enhanced overall student service during registrations from 8 hours down to 30 minutes.
- Implemented PlacePro (Internet based Co-op and field placement application) in three academic divisions (Faculty of Business, Faculty of Hospitality and Tourism, Faculty of Technology) – complete process re-engineering from manual to Internet based application.
- Managed the Student Service Centre in the School of Business and Co-op offices for six months during a management transition stage

Key accountabilities

- Leading teams and stakeholders during project evolution and challenges
- Managed various project management tasks which included Vendor Relationships, Project Management, Change Management, Risk Management, Issue Resolution, Issue Escalation and Operational Processes, Budget Management
- Developed, executed, monitored and implemented project plans using Microsoft Project.
- Identify project risks and proactively develop contingency plans to mitigate the risks
- Communicated weekly and monthly project status to sponsors and stakeholders through status meetings and progress reports
- Managed external vendor relationships
- Managing the Student Service Center, Co-op office and various projects
- Developed and delivered training to staff as well as students for new software implementations in the Co-op office as well as enhancements to Banner and the Banner student portal
- Planned and executed Key Performance Indicator (KPI) sessions with students
- Prepared and delivered business analysis findings as well as recommendations to management teams including senior school officials
- Conducted room audits and made recommendations to address deficiencies

Professional Experience (continued)

Canadian International – CI funds - 2005-2005

Project Manager / Business Analyst (Contract)

- LongView 2000 Portfolio Management – Implemented application in the San Francisco office.
- Bell IVR – Reviewed IVR solution and upgraded structure to accommodate current business requirements. Integrated bilingual IVR offering. Managed upgrade with Bell Canada.

WNBC (World Network Business Club) - 2001-2003

Business Analyst and Project Manager (Self-employed)

Provided business solutions to small/medium sized businesses through a network of small business providers.

Mosaic Group Inc. - 1999/11 - 2001/04

Director, Information Services, Marketing division

Responsible for Information Services – strategic and tactical. Management of teams: help desk, application development, network and system administration.

- Member of senior management team, responsible for Information and Technical Services
- Implemented Computer and Information System policies/procedures
- Developed strategic direction for infrastructure technology and software applications
- Negotiated \$5M Canadian and European licensing with Microsoft, Adobe and Quark
- Business Analysis and Project Management (application development and strategic planning, software licensing program for 30 business division worldwide, Windows/2000 server/desktop deployment, help desk)
- Software applications management (Oracle finance ERP, Intranet, Internet, Credit Card rewards program, Customer databases)

Select Technology Group - 1998/05 - 1999/10

Project Manager, Customer Care and Billing

Implementations of eBusiness Internet customer care and billing software (IAF) in International telecommunication companies.

- Managed E-commerce software application implementations – Internet usage transaction processing, Credit card processing, Customer care and billing
- Implemented software projects with clients in Canada, USA, Europe, Africa

Professional Experience (continued)

Mackenzie Financial Corporation - 1996/01 - 1998/04

Manager, Business Delivery Systems, Business Solutions

Strategic planning of corporate initiatives, project management, business analysis, management of application development team.

- Member of strategic management team
- Assessed business plans and current technologies, proposed strategic and tactical recommendations to senior/line management team
- Application development management (including project management)
 - Internet/Intranet application and technologies
 - Distribution application and financial planning tools (InfoMac)– distributed to 5,000 financial planners across Canada
 - Extranet File Distribution application – dealer trade confirmations, client portfolio & demographics (savings of \$80,000 annually)
 - RSP Loan Extranet Application for MRS Trust Automated workflow application for new employees – FileNet
 - Involved in full life-cycle of application development.

Multiple Retirement Services Inc / MRS Trust - 1994/10 - 1996/12

Vice-President, Information Systems

Senior management reporting to the President. Responsible for technical teams: Application development (Applications: Client portfolio, billing, financial trading); Database Administration; Help-Desk; Network and Computer operations. Representative on FundSERV Extranet EDI technical/trade boards, Mackenzie Financial senior Information services team.

- Member of senior management team - MRS Inc, MRS Trust
- Representative - Mackenzie Financial Technical Committee
- Representative on FundSERV & EDI technical board
- Responsibility for all aspects of Information Services (application programming, networks, system administration, servers, desktops, imaging and workflow - FileNet, eBusiness)
- Implement effective/efficient information systems in the organizations to support organization

Professional Experience (continued)

Multiple Retirement Services Inc / MRS Trust - 1992/09 - 1994/09
Manager, Application Development & Systems

Manage software application and system administration teams.
Application: Client portfolio; billing; trade processing.

- Responsible for Information Services (application programming, networks, system administration, servers, desktops)
- Business analysis and Project Management
- Application development of the Client Portfolio System, RRSP account management, trade processing. Involved in full life-cycle of application development.

Multiple Retirement Services Inc / MRS Trust - 1989/09 - 1992-08
Senior Programmer/Analyst

Application development of Client Portfolio, billing and trade processing applications
(re-architecture from Cobol to Progress)

- Software application re-architecture from Cobol to Progress and C - Business solutions: Client portfolio, billing and trade processing.
- Involved in full life-cycle of application development.
- Responsible for computer system architecture (network, security and computer operations)

Memotec - Real Time DataPro - 1988
Programmer/Analyst - Insurance division

Prudential-Bache Securities - 1987
Programmer/Analyst - Brokerage

Real Time DataPro - 1986
Programmer/Analyst - Municipal division

Bache Securities - 1985
Programmer - Brokerage

Education

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|-------------|---|
| 2019 | The Complete Agile Project Manager
Project Management Institute (PMI) |
| 2006 | Certified Project Management Professional (PMP)
Project Management training at University of Toronto – Preparation for the PMP exam. PMP certified since May 2006.
Project Management Institute (PMI) |
| 2001 | Certified Professional – E-Commerce
(XML for B2B e-Commerce Solutions, Building an e-Commerce Website)
Learning Tree International, Toronto |
| 1998 | Certified Professional – Internet/Intranet
(Introduction to the Internet and Intranets for Business, Developing a Web Site, Intranet Technologies, Internet & Intranet Security, Java Programming)
Learning Tree International, Toronto |
| 1983 - 1985 | Diploma, Computer Programming & Business Systems
Honor student - Dean's List
DeVry Institute of Technology, Toronto |

Professional Development and Memberships

2019	Email Marketing Specialist Certificate Ryan Deiss Education
2018	Direct-Response Copywriting Specialist Ryan Deiss Education
2018	List Grow – Direct Response Marketing Mike Dillard Education
2005 - 2006	Curriculum for Living Three courses: Landmark Forum, Landmark Advanced, Self Expression and Leadership. Technology to create a powerful life with enhanced communication and leadership skills involving community Landmark Education, Toronto, ON
2003	Earth Skills Goal Setting, Time Management, Presentation Skills, Creative Thinking, Self Esteem, Assertiveness, Customer Service, Negotiating, Writing for Results, Sales World Network Business Club, Toronto, ON
Other	Member of Project Management Institute SOC, Negotiations, Influence Without Direct Authority, Windows Planning & Deployment, Cold Fusion, C++, Unix, Mac OS X, HTML, XML, Microsoft – Project / Access / Visio / Office / Visual Basic / SQL Server, Digital Vax System Admin, Object Oriented Methodologies, NetObject Fusion, FileNet Workflow and imaging, Adobe Photoshop, Quark Xpress, Dreamweaver, Oracle, Progress RDBMS and Programming

References

Personal and work-related references provided upon request.