

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) using many different notations including Object, State Transition, Business Process Notation

Project Management and Oversight

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

Process Improvement

Includes: CMMI, ITIL

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 TIMELINE:

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

2008 – 1998		1998 – 1977	
02/94-12/08	Strategic Business Decisions, inc.: <i>Speaking, Writing, Mentoring, Training, & Consulting</i> Link to eZine Articles: http://www.SBDi-Consulting.com/Archives.shtml Link to Blogs: http://sbditipsblog.wordpress.com or http://communicatewithgeeks.wordpress.com		
07/08-10/08	NYC Dept of Education, Division of Revenue Operations		
01/06-07/07	BurrellesLuce Media Clipping Company	09/97-02/98	Prudential Insurance
08/05-11/05	Christie's Auction House	06/97-08/97	Sherwood
01-05-06/05	JP Morgan Chase	02/97-06/97	Jaguar (a.k.a. Ford)
01/02-04/08	Scarlet's Feathers Greetings	06/95-10/97	Bank of New York
03/04-07/05	To The Point Consulting for Small Business	06/94-12/95	American Insurance Group
11/98-06/04	Bank of New York	01/94-06/94	Chemical Bank (a.k.a. JP Morgan Chase)
06/02-02/04	Neighborhood Connect	03/91-01/94	United Parcel Service
01/02-02/02	X-Change Technologies	04/89-01/91	Teradata (a.k.a. NCR)
09/98-10/98	EG Consulting	10/87-04/89	Manufacturers Hanover Trust (a.k.a. JP Morgan Chase)
03/98-08/98	New York Life	02/87-10/87	Paine Webber (a.k.a. UBS)
03/98-05/98	Dept of Corrections	06/77-02/87	International Business Machines

CURRENT ACTIVITY KEYNOTE SPEAKER, AUTHOR & MANAGEMENT CONSULTANT:

- Mentoring specific clients on improving the business relationship and business intelligence.
- Speaking to Information Technology groups (company and associations) on Engaging Business.
- Speaking to business organizations on how to get more from Information Technology groups.
- Interviewing executives responsible for company/division application development areas for new book.
- Issuing eZines every other week to over 600 Information Technology clients.
- Updating a Blog on *Rules of Engagement* to reach project managers and business analysts on how to engage the business community.
- Updating a second 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.
- Speaking to business organizations on how to get more from Information Technology groups.

EXPERIENCE BY KEY SUBJECT AREAS

(only relevant experience has been documented):

PROJECT MANAGEMENT (20 years experience)

AKA: Program Management, Project Leader, Project Coordinator, CIO Assistant

Common Activities Included:

- Developing strategies for implementing new departments and processes within the IT divisional framework.
- Included continual progress reporting to business units and executive board.
- Developed risk avoidance plans with countermeasures and trigger points.
- Developing documentation to support the initiation and tracking and oversight of one or multiple simultaneous projects. Documentation resembled IEEE standards.
- Included estimating project size and re-evaluating at different phases of development.
- Project types were primarily new development with occasional major enhancements.
- Managing staff up to a total of 20 individuals including delegation of tasks, training, and evaluating individuals. Individuals included employees, consultants, and off-shore coordination.
- Included development and presenting information to keep upper management informed on projects including risk assessment, issue resolution, and regular status.
- Estimating, obtaining approvals, and budgetary charge-back activities for projects up to \$25 million in size.
- Included the continual coordination between systems and data center for project implementation.

Corporations/Companies where work was performed (Maximum Team/\$\$\$ Project Size):

- American Insurance Group (4/\$10mm)
- Bank of New York (20/\$25mm)
- BurrellesLuce Media Clipping (8/\$15mm)
- Chemical Bank (1/\$1mm)
- International Business Machine (7/\$5mm)
- JP Morgan Chase (6/\$2mm)
- Manufacturers Hanover Trust (5/\$10mm)
- NYC Dept of Education (1/\$2mm)
- Paine Webber (3/\$5mm)

PROCESS MANAGEMENT (15 years experience)

AKA: Project Management Office, Software Process Improvement

Common Activities Included:

- Developed standard processes for corporations, divisions, and individual projects for Level 2 and 3 Key Process Areas following IEEE Templates.
- Developed, customized and implemented Standard Development Life Cycles for Data Warehousing, Requirements Engineering, Large-Scale Development, Maintenance, Test Strategy and Project Management activities.
- Developed strategy for implementing CMM & CMMi for a division.
- Educated IT and business personnel on CMMi activities.
- Evaluated processes for accuracy, completeness and compliance to CMMi.
- Coordinated activities and reviewed documentations for company compliance.
- Introduced Six-Sigma concepts.
- Educated process auditors on Sarbanes-Oxley and CMMi coordination activities.

Corporations/Companies where work was performed:

- Bank of New York
- BurrellesLuce
- Chemical Bank
- Department of Corrections
- Manufacturers Hanover Trust
- NYC Department of Education/Division of Revenue Operations
- New York Life
- NYC Dept of Education
- Prudential Insurance
- To The Point Consulting

BUSINESS PROCESS ARCHITECTURE (25 years experience)

AKA: Requirements Engineering, Requirements Development, Requirements Management, Requirements Architecture, Business Process Architecture, Data Analysis, Data Warehousing, Business Analysis, Business Re-Engineering, Security and other Quality of Service Impact Analysis.

Common Activities Included:

- Developed and presented seminars on Requirements.
- Built trusting relationships between business and data center organizations. Developed Requirement Specifications using assorted Requirements Development/Analysis tools for the following focus types: actor, data, network, event, processing, business rules, project constraints, and quality of service.
- Specifications varied in detail from high-level scope to fully detailed logical design (level 3 of the Zachman Framework). Detailed specifications included the association of the different focus type of requirements.
- Requirement Representations included: Logical Data, Data Flow, UML, Use Case, Class, State Transition, Entity Life History, Event Sequence, Network, and Business Decomposition. All representations included the supporting text detailing the needed requirement attribute information.
- Involved interviewing multiple cross-sector business areas (including across corporate boundaries) of varying organizational levels of knowledge experts to executive sponsors. Included both domestic and European business personnel.
- Required the planning, elicitation, analysis, specification, validation, verification, approval and management of requirements using assorted Requirements Management Tools and Techniques. These process steps expand upon the CMMi Requirements Development Key Process Area based upon practical experience with large institutions.
- Involved assisting executives with strategy development and validation of business policies, rules, and process efficiencies.
- Interviewed company executives to develop a strategic business intelligence monitoring and measurement system to help the business transition in a new and profitable direction.
- Selection and implementation of the right tools for Business (Business Intelligence), Project Managers, and Analysts.

Corporations/Companies where work was performed (Business Subject Area/Application):

- American International Group (Reinsurance Business Sector)
- Bank of New York (Government Clearance, TriParty, Energy Trading)
- BurrellesLuce (Royalty/Copyright Data Warehouse)
- Christie's Auction House (Property Management—including Auctions)
- Ford/Jaguar (Vehicle Tracking)
- International Business Machine (Order Processing)
- Manufacturers Hanover Trust (Retail Banking)
- NYC Department of Education/Division of Revenue Operations
- Paine Webber (Human Resource Organizational Control)
- Prudential Insurance (Medical Claims Processing)
- Teradata/Chemical Bank (Customer Relationship Management/Householding)
- United Parcel Service (Customer Incentive Analysis, Logistics Modification)

PRODUCT/BUSINESS DEVELOPMENT (7 years experience)

AKA: Small Business Assistance, eCommerce Guidance

Common Activities Included:

- Researched the feasibility and estimated the profit making point for a new retail company. Results were compiled into a detailed business case.
- Developed or assisted in the development of a Business Plan (including a marketing and sales strategy) for eCommerce companies.
- Developed 4 product lines for a new wholesale and retail company.
- 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.
- Re-evaluate the validity of age-old business policies and rules.

Corporations/Companies where work was performed (website):

- Christie's Auction House (www.christies.com)
- Neighborhood Connect (www.nhconnect.org)
- Scarlet's Feathers (www.ScarletsFeathers.com)
- To The Point Consulting (www.ToThePointConsulting.net)
- X-Change Technologies (www.xChangeTechnologies.com)

CURRENT SEMINAR OFFERINGS:

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

VERBAL COMMUNICATION SUCCESS:

- Seminar Offering: Are You Asking the Right Questions?
- PMI LI Chapter Meeting on Engaging your Internal Customer, October, 2008.
- 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."

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.

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)