

Mission Based – Problem Solving Principal Program or Project Manager

- **Expertise:** Direct high profile, complex, cross-functional global initiatives of 50+ FTE (Business Sponsors, Project Managers, Business Analysts, System Architects, Developers, Data Base Administrators, and Quality Assurance) for web based, e-commerce, eLearning, customer service, insurance, health care, financial management and marketing software application and program development; budgets \$100K to \$50M
- **Industries:** Financial Services, Insurance, Healthcare, Information Technology, Retail, Not-for-Profit, Publishing, Consulting, Training, and Marketing and Advertising
- **Core Competencies:** Program/Project Management, Training & Development, eLearning, Organizational Development, Business Process Management, Vendor Management, Business Process and Systems Analysis
- **Technical Skills:** Microsoft Professional Office, Visio, PowerPoint, Publisher, Project, Outlook, Excel, SharePoint, Enterprise Reporting, Salesforce, Vartopia, Zift, Inluitive, Oracle Financials 11.i and V12.0, HP- PPM Center V.7.5, HP-QC v10.0, Moxie Customer Spaces 9.1, Brainshark, Survey Monkey, JIRA 6.3, Asana, Smartsheets, Wrike Project Management, SDLC, Waterfall, Agile methodologies
- **Soft Skills:** Organized, Disciplined, Analytical, Focused, Creative, Realistic, Compassionate

Professional Experience

R.J. Walters, Inc. – The Advantage Consulting Group, Metro West, MA

Oct. 2000 to Present

Principal/PMO Director/Program & Project Manager

Business Process Management, Training & Development, Organizational Development, and Cultural Change Systems

Responsibilities and Achievements by Client and Industry:

Information Technology

- **SimpliVity – Westborough, MA**
Designed a Curriculum Development Life Cycle (CDLC) to direct the development of five sales enablement programs empowering VARs and Partners to support all aspects of the SimpliVity sales cycle. Directed the implementation of the CDLC to improve curriculum creation productivity and output by 50%. Directed the implementation and integration of the Vartopia application into Salesforce including business process improvements and change management practices.
- **Dimension Data – South Africa/Framingham, MA**
Directed the creation of an activity reporting system that streamlined the execution and delivery of financial and productivity data from 4 days to 4 hours through the creation and implementation of a business process tool set (SAM©) realizing \$1.4M annual savings and an 8:1 ROI.
- **EMC Global Services/ Global MSS Training & Development and Business Technology Group – e-Services Hopkinton, MA**
Created the mission, strategy and tactics for the Global Services Training Team strategic plan for 3500 members of the Global Services community and a Service Readiness Program for steady-state and new product business. Directed Continuous Improvement initiatives for a mission-critical, high visibility, customer facing application (Live Chat - Moxie Customer Spaces) including two (2) upgrades.

Financial Services

- **State Street Financial - Enterprise Risk Management Division – Credit Engineering, Boston, MA**
Directed 10 Business Analyst in the definition of project scope, objectives and the execution of implementation for the customized version of the Fermat GEM (Global Exposure Monitoring) application, including 4 functional areas, 20 capabilities and 90 limit management, risk and compliance task features.
- **Fidelity Investments, Smithfield, RI**
Senior Program Manager for initiatives of the Communications Development and Fulfillment group responsible for operational and strategic initiatives to deliver email and print communications through enterprise outbound platforms.
- **RBS/Citizens Financial Group - Cash Management Services – BPM Project, Providence, RI**
Responsible for the collaboration of outside vendors, stakeholders, subject matter experts and end user workshops and work session environments to implement a web based business process management system as a replacement to the Cash Management system.

Publishing and Not-for-Profit

- **Massachusetts Medical Society – New England Journal of Medicine Group, Boston, MA**
Senior Project Manager for a cross functional team of 15 for the initiatives of the Adobe Advertising & Analytics Project to implement Dynamic Tag Manager, Analytics, and Audience Manager products of the Adobe Marketing Cloud Suite.
- **Trinity Episcopal Church, Whitinsville, MA - The Episcopal Diocese of Western Massachusetts**
Director of Capital Campaign Planning & Development that designed a strategic plan to raise \$500K for the restoration of a historic church and to include handicap accessibility.

Retail, Marketing and Advertising

- **Staples, Inc. - Convenience Card and Procurement Card Projects, Framingham, MA**
Managed a team which re-engineered 17 functional tracks in a retail contract environment including the creation of all requirements documents, use cases, user test scripts and wire-frames which upgraded all functionality to be PCI compliant and brought the define phase of the project in 40% ahead of schedule.

Healthcare and Insurance

- **MassHealth – Office of Health & Human Services- New MMIS Project**
Managed and facilitated five functional areas (Prior Authorization, Pre-Admission Screening, Member Management, Managed Care, and Customer Service) which included creating a business process engineering methodology, requirements documents, use cases, gap analysis, user testing, business and resource impact, and quality control reporting.
- **Fresenius Medical Care - North America, Lexington, MA**
Directed 10 Business Systems Analysts and a Project Portfolio of approximately 75 initiatives for a customized version of Siemens “Soarian for Clinical Care,” CMS, and CROWNWeb applications.
- **DentaQuest - IT Application Services – Windward & Oracle Financials Integration, Boston, MA**
Facilitated the elicitation of business and functional requirements with a team responsible for upgrading and integrating Oracle Financials with the Windward (claims processing) system that included 5 functional areas (Accounts Receivable, Accounts Payable, Cash Management).
- **FM Global & Affiliated FM - Client e-Business Systems – Client Technology Extranet, Johnston, RI**
Facilitated the elicitation of business and functional requirements for seven (7) product areas of a world-wide initiative to implement an extranet web based platform (CTI – Client Technology Interface) for brokers and clients of Affiliated FM. Product areas included Policy, Claims, Engineering Data and Delivery, Resource Library, Subscriptions to Alerts, and Map Center.

Ingraham & Associates, Inc.

Jan. 1997 to Sept. 2000

Professional Domestic Engineering Agency

Co-Founder/VP of Administration

- Grew organization to achieve gross annual revenue of \$750K and a 250-person client list

A.T. Hudson & Company, Paramus, New Jersey

Jan. 1986 to Dec. 1996

Director and Program Manager

- Positioned an international consulting firm to secure a \$40M engagement with a major European bank after surpassing annual revenue opportunities by 25% for an affiliated financial institution. (*Key Bank, NA and National Westminster Bank*)
- Positioned a Fortune 500 company to acquire assets increasing their value by 250% through the design and implementation of an activity management system, (ProAct©) realizing a \$7.5M in annual savings with a 7:1 ROI (*OneAmerica Insurance Company*)

Education and Associations

BA/MA, Production Management

International Academy of Performing Arts

College Preparatory, Professional, Business

Worcester Academy, Worcester, MA

Mentor/Coach for Professional Certifications

PMP and Six Sigma Programs

Groups and Associations

ABPMP - Association BPM Professionals

IIBA – International Institute of Business Analysis