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SENIOR IT PROJECT MANAGER

Strategic information technology executive who combines broad soft skills with deep hands-on technical capabilities in IT and project governance, PMO, software development and business analysis. Extensive experience in delivering complex software systems. Diligent and detail-oriented in project methodology and IT governance. International exposure (in USA, UK, France and Egypt).

KEY COMPETENCIES

Leadership	Innovation	PMO
Risk Management	Business Analysis	Project Governance
Change Management	Cloud Infrastructure	Project Management Professional
Certified Agile Scrum Master	Scaled Agile Framework	Chartered Property and Casualty Underwriter

PROFESSIONAL HISTORY

SAPIENS, REINSURANCE DIVISION, TORONTO, ONTARIO, CANADA

Senior Project Manager

April 2023-Present

Sapiens provides transformative digital-led solutions to top tier reinsurance companies. I'm working with these clients to implement world leading products such as ReinsurancePro

DOTLEADER, TORONTO, ONTARIO, CANADA

Independent Consultant

January 2020-March 2023

Engagements

- **CSIONet Modernization:** Working through ITnet (KPMG), I joined the staff of the Centre for Study of Insurance Operations (CSIO) to take over management of the user acceptance testing and release to production of a troubled industry-wide initiative.
 - Successfully coordinated nationwide user testing by thirty companies sending EDI and eDoc messages using API and POP3/SMTP through the CSIONet exchange, including detailed functional, end-to-end and performance test cases
 - Working with the CSIO team and industry participants, released and validated the system in its new AWS production environment
 - Prepared and delivered communications to senior executives at participating insurance companies
- **Horace Mann IT Roadmap:** As a member of a small team of experts in digital transformation and data analytics from RCG Global Services, I analyzed the client's sales and marketing business practices and their technological maturity, and formulated a multi-year strategic roadmap for the digital transformation of the company aiming to deliver a seamless agent and customer experience
 - Produced 145 findings from which were derived numerous business opportunities
 - With the team, successfully delivered a conceptual solution architecture encompassing a trusted data foundation, analytics tools and a unified sales experience for all lines of business
- **Precision Content Authoring Solutions:** on a short-term contract in the Director of Development role:
 - Launched a strategic DevOps initiative to develop processes and a culture of continuous improvement in the Development and Support teams, aimed at delivery speed, quality, innovation and effort estimation accuracy
 - Conducted a detailed analysis of the team's skills (current and target states) to serve as the basis for hiring and organizational learning strategies

HUDSON INSURANCE GROUP, INFORMATION TECHNOLOGY DEPARTMENT, NEW YORK, NY, USA

Assistant Vice President, Program Manager

May 2009-December 2019

The Hudson Insurance Group, a member of the Fairfax group of companies, is a specialty insurance underwriter of primary and excess property and casualty insurance, and the U.S. Insurance Division of OdysseyRe.

- Rapidly delivered an activity-based costing system reporting each business unit's actual profit and loss figures, featuring an accurate distribution of corporate overhead to each program, that enabled C-level executives to conduct program-level P&L analysis and realistic strategic planning
 - Managed a cross-functional team of subject matter experts, analysts and developers to design, develop and test three integrated modules
 - Produced user documentation and delivered training for all Hudson's senior executives
- Increased speed, accuracy, efficiency and scale of the company's Personal Umbrella insurance program by delivering a highly-customized policy management system
 - Automated the request of Motor Vehicle Reports from LexisNexis and their inclusion in ratings, compliant with NIST 800-53 security controls (which elevated corporate network security generally)
 - Deployed an XML data transformation process for the renewal of legacy policies in the new system
 - Orchestrated exhaustive quality assurance, user acceptance and automated regression testing
- Led the development, testing and implementation of a specially designed insurance accounting system that automates critical business calculations, such as loss reserves, acquisition costs, and commissions, and posts the results to the data warehouse and the general ledger, which greatly enhanced the speed and accuracy of the monthly accounting workflow for all programs
- Created a specialized insurance portal for underwriters to process requests for facultative reinsurance, with simple workflow and data capture enabling operations by rating, document production and reporting engines
- Led an Agile team in the successful development and delivery of a policy administration system for the company's commercial auto lines of business
- Contributed to the design and implementation of project governance processes as a PMO team member which enabled more efficient portfolio management and comparable metrics across projects
 - Supported the PMO and project teams by administering the department's Jira and Confluence systems
- Developed automation for Excel-based business processes using VBA to:
 - Control XML inputs and outputs
 - Validate structured document schemas
 - Maintain JSON files for rating system integration

DELOITTE & TOUCHE TOHMATSU, OFFICE OF INFORMATION MANAGEMENT, PRINCETON, NJ, USA

Deloitte Audit Program, Team Lead

December 2007-December 2008

The Deloitte Audit program combines custom software with COTS to create a global engagement support system for 40,000 auditors. It includes a Content Management System to create, manage and publish complex structured DITA XML data.

- Delivered to end users an XML authoring system for the production of complex, structured content to precisely support all audit engagements worldwide
- Led the detailed business analysis and development of DITA-based XML schemata that enable the management of complex content:
 - which included embedded business logic with the informative content, and
 - was capable of being filtered, combined and augmented to support the most finely focused engagement
- Led the program's integration sub-project to deliver protocols for data exchange between software modules

DUNDEE WEALTH MANAGEMENT, INFORMATION SYSTEMS DEPARTMENT, TORONTO, ONTARIO, CANADA

Director IT Project Management Office

January 2004-September 2005

Dundee was a TSX-listed financial services company engaged in investment banking, securities brokerage, financial planning and investment advisory services (acquired by ScotiaBank and succeeded as HollisWealth).

- Initiated, designed, developed and implemented a Project Management Office to enhance governance and serve as a resource for project managers, successfully migrating the Information Systems department from ad hoc project management to formal methodology and controls for all major projects
- Initiated and implemented company-wide a Project Management Information System, customized to reflect corporate strategic objectives, project management practices and standards for reporting

- As a project manager:
 - Conducted a digital transformation of the account opening process by integrating innovative front office account management tools, managing the project from vendor selection through development
 - Managed upgrade and enhancement of key applications for the on-line distribution of documents (client document images, account statements and tax receipts) to investment advisors
 - Initiated, planned and conducted requirements analysis for various high-profile projects, including electronic monitoring of client communications for the Compliance Department
 - Initiated and planned a series of sub-projects consequent on the conversion of the back office database (including all dependent in-house and third-party applications and infrastructure)

OTHER RELEVANT EXPERIENCE

SOFTWARE STARTUP

Joined a San Francisco company developing commercial insurance marketplace software, as a project manager and business analyst. Worked with many major insurance carrier partners including The Hartford, St. Paul, Wells Fargo and Zurich.

PROFESSIONAL SERVICES CONSULTING

Travelled widely as a business analyst and data modeler working on the digital transformation of paper-based systems through development of innovative SGML- and XML-based content management solutions.

Promoted to Managing Consultant. Major clients included:

- Boeing
- State of Michigan Legislature
- United States Navy

CANADIAN FORCES

Communications and Electronics Engineer

Commissioned in the Canadian air force, in the Communications and Electronics Branch. Career highlights included managing all IT for a multinational peacekeeping force in the Sinai desert; serving as Operations Officer and general's aide with the Defence Liaison staff at Canada's high commission in London; providing telecom and IT services to Canada's largest air transport base. Earned the Canada Decoration and was honorably discharged at the rank of Captain upon completion of service. All postings:

- National Defence HQ, Directorate of IM Policy and Architecture (DIMPA 3-5-2), Ottawa, Canada
- Canadian Defence Liaison Staff (SO Ops), London, United Kingdom
- Multinational Force and Observers (SO ADP), El Gorah, Sinai, Egypt
- Canadian Forces Command and Staff College (SO3 ADP), Toronto, Canada
- Canadian Forces Base Trenton, Base Telecommunications (A/BTelO), Trenton, Canada

EDUCATION:

Executive Master of Science, Technology Management

Columbia University, New York, New York

Bachelor of Arts (Honours), Mathematics

Queen's University at Kingston, Kingston, Ontario, Canada
Honours program (4 years), including a concentration in physics

Chartered Property Casualty Underwriter

American Institute for Chartered Property & Casualty Underwriters

- Eight courses of self-study; including elective Enterprise Risk Management

Project Management Professional Certification

Project Management Institute

Other Continuing Education (Highlights)

- Leading SAFe – Business Agility Consulting – Certified SAFe® 5 Agilist
- COBIT 5 Foundation – The Learning Tree
- Scrum for Scrum Masters – Quallsys Solutions (Dr. Timothy Korson) – Certified Scrum Master
- PMI Agile Certified Practitioner (PMI-ACP) Boot Camp – Carolla Development, Inc. (Alan Cline)
- Database Design and Development – New York University Continuing Studies
- Chartered Financial Analyst Level 1 (Passed) – CFA Institute

