

A results-oriented senior Leader with over 23 years experience in a range of industries. Effective in strategy development and execution, organisational transformation and development, complex project and programme management, software engineering, information systems architecture, negotiation, arbitration, and consensus-building, and adding bottom-line value. Flexible, high-energy, passionate, committed individual who fosters solid partnerships, and develops staff through effective leadership and mentoring.

Career Overview

CLEARLYBYDESIGN, Toronto, Ontario

2009 - Present

ClearlyByDesign is a top website solutions provider, offering quality design and development, delivered in a timely fashion and at a budget-friendly price.

Owner / Principal.

Enriching clients' businesses through effective website design and delivery. Accountable for all phases of website delivery, from establishing goals and identifying stakeholders through to implementation and post-implementation support. See www.ClearlyByDesign.com for further details. Also operate as a trusted advisor for a number of organisations:

- Coached a VP of a small insurance services firm in management, objectives setting, performance management, and organisational structure. Provided technology strategy direction as well.
- Lead an amateur athletic association in formalising itself, including guiding through the process of mission and vision statement setting, incorporation as a not-for-profit, board and governance structure including drafting of bylaws, application for funding, and strategy for growth. Acting as its current Chair.
- Advised a small consulting firm on organisational structure and development to facilitate its next growth phase.
- Helped a private investigations firm identify, interview, and hire a technology manager.

DAVIS + HENDERSON, Toronto, Ontario

2009 - 2010

Davis + Henderson is a leading solutions provider to the financial services marketplace. Founded in 1875, the company provides innovative programs, technology products, and technology-based business services to customers who offer chequing accounts, credit card accounts, and personal, commercial, and other lending and leasing products.

Vice President, Product Development, Credit Solutions.

Led a team of 150 software engineering professionals building, maintaining, and supporting the company's credit solutions software offerings, with tens-of-thousands of users globally.

- Initiated work to improve software quality, metrics gathering and reporting, and improvement in release scheduling and management, to achieve better final-time-to-market, lower overall cost, and improved customer satisfaction.
- Mentored direct reports on organisational structure for their areas, and change management to ensure successful transitions to new structure.

BEARINGPOINT, Toronto, Ontario

2007 - 2009

BearingPoint was a leading global management and technology consulting company known for its deep industry experience and high customer satisfaction. BearingPoint's more than 16,000 employees provided strategic consulting, applications services, technology solutions and managed services to government organisations, Global 2000 companies and medium-sized businesses around the world.

Manager, Financial Services Technology.

Consulted to clients in strategy and leadership, including:

- Led work for a large, global financial institution providing a strategy and overall roadmap for re-engineering its software delivery process, the implementation of which would result in potential cost savings of CND 30 million annually after three years, or roughly 23% of the software delivery budget for the targeted division. Strategy included process design incorporating leading practices, organisation design, and organisational change management / transformation.

- Led the infrastructure architecture work for the implementation of a web-technology-based enterprise level claims management systems at a leading Canadian insurance provider. Coached client's team on strategic software licensing and services contract negotiations with third-party vendor.

CITIGROUP / UNISEN INC. / AGF MANAGEMENT LIMITED, Toronto, Ontario

1999 - 2007

AGF Management Limited is one of Canada's top mutual fund and wealth management companies, providing financial services to over one million investors. Unisen Inc., formerly a wholly owned subsidiary of AGF, was the leading provider of third-party back office solutions to fund companies and financial institutions with fund products in Canada. Unisen was acquired from AGF Management in 2005 by Citigroup, one of the world's largest financial institution, operating in over 100 countries.

Vice President (AGF, Unisen), Senior Vice President (Citigroup), Transfer Agency Systems, Global Transaction Services.

Accountable for teams of from 50 to 150 full-time and contract professionals building, maintaining, and supporting the two core transfer agency systems — AGF's system, and Unitrax®, Unisen / Citigroup's flag-ship software system for transfer agency record-keeping in Canada. Also responsible at various times for non-core systems such as Sales Force Automation, Oracle Financials and HR, Lotus Notes, and Work Flow and Imaging. The transfer agency systems support thousands of concurrent users in OLTP and batch modes, providing full functionality for maintaining unit-holder records of the funds of over 150 mutual fund companies, representing 30% of the Canadian mutual fund industry, or CND 270 billion (as at Jan 2007).

- Managed the strategic core technology change replacing the sun-setting development languages used for Unitrax®. Included situation analysis, overall organisational planning, options analysis, product evaluation, prototyping, final selection, price and contract negotiation, liaison with and education and situation management of all effected areas of the firm and its clients, planning the entire programme (CND 9 million), directing development teams and integrating new components into the code base through the normal release cycle. Lead significant re-architectural work that resulted in a savings of over 20 effort-years or CND 1.8 million of the overall cost of the initiative.
- Directed service-oriented architecture initiative, providing key services to transfer agency clients, generating additional revenues of CND 250,000 initially, with anticipated additional annual revenues of at least CND 1 million. Also provided critical technology foundation for strategic architectural direction of Unitrax®.
- Achieved highest scores amongst all departments in the division on employee satisfaction survey in all key areas.
- Led significant turn-around work in the Unitrax® development team to improve quality of developed software. Defect levels dropped to lowest ever, with increase in Citigroup-over-client-captured defects by 33% in less than one year.
- Prepared critical information and was key respondent on Unisen's side in due-diligence process for the Citigroup acquisition of Unisen from AGF, a CND 124 million purchase.
- Performed due-diligence review of underlying technology, software development processes, and other business area reviews as part of the CND 65 million Jewelstone acquisition.
- Managed the complex conversion within three months of Global Strategy's Transfer Agency systems into AGF's, in the wake of AGF's Global Strategy acquisition. Included converting current and historical data for CND 6 billion in assets in 400,000 accounts, implementing grandfathered functionality, ensuring compliance with all regulations and prospectuses, and co-ordinating with outside entities including the Ontario Securities Commission, the dealer-broker network, and FundSERV. The project — the largest in AGF's history — was delivered on time, under budget, and with full functionality in place for all key dates. Delivery permitted Global Strategy unit holders to switch without penalty into AGF funds, retaining CND 1 million in annual revenues for AGF.
- Re-engineered two large departmental organisations, both of which involved job function redesign, relocation of responsibility for five major systems, and a physical relocation. Achieved zero staff attrition, increased employee morale and effectiveness, and the change process led to significant improvements in project and service delivery.
- Co-led the project to replace the server-side hardware for the Transfer Agency system, re-engineering the technology infrastructure from Siemens to Sun platforms, significantly increasing capacity and performance (speed and stability).
- Directed successful Y2K software migration project for the AGF Transfer Agency and other systems, on time and without error.
- Designed and implemented software engineering approaches and solid project management for the AGF Transfer Agency System team, decreasing overall delivery time and dramatically increasing software quality and end-user satisfaction. Changes lead to 100% of all started projects being completed and the resulting systems used in production.

Additional achievements include: directed additional systems implementations and enhancements to the Transfer Agency System such as household mailing ability, saving CDN 500,000 annually, and implemented the Registered Education

Savings Programme product, generating annual revenues in excess of CDN 5 million; re-engineered automated processes such as the quarterly statement runs reducing run time by 60%; implemented the Harmony brand of products with all its unique features into the AGF transfer agency system eliminating two third-party systems and the associated annual costs; and guided formation of new product offerings as a member of the New Product Development Committee at AGF.

COTT CORPORATION, Toronto, Ontario

1994 - 1999

Cott Corporation is the world's fourth largest soft drink manufacturer and the leading provider of retailer-branded beverages, operating principally in Canada, the United States of America, and Great Britain.

Director, Systems Integration and Development, Strategic Information Services (1997 – 1999).

Led a team of project managers, systems analysts, developers, database administrator, technical writer / Webmaster, and contract and consulting services. This team created in-house-developed business systems solutions, and implemented and supported cross-functional and wide-scope systems, including ERP and the North-American-wide budgeting system.

- Directed the North America rollout of the Stock Locator System (see below) to the remaining eight sites. Included modifications for Advance Ship Notices and integration into major ERP systems. Achieved continued annual savings in excess of CND 100,000 per plant, and increased efficiencies and customer service.
- Initiated Y2K project, including generation of internal awareness of the impending problem, preparation of RFP, co-ordination of corporate steering committee, selection of service providers, and hand-off to the project director.
- Managed the development and implementation of a North American sales reporting system (data-mart) with a high level of information granularity (eg., customer, SKU, ship-to point), reporting daily key volumes to management. Enabled management to significantly improve control of consolidated sales, and determine sales performance day-to-day, allowing timely focus of sales forces to meet targets.
- Led the setting of and gained consensus on definitions and standards for corporate-level Key Performance Indicators for manufacturing operations in co-operation with a team of senior operations management. Implemented definitions in North-American-wide Production Reporting System, permitting senior- and executive-level management to uniformly compare results of manufacturing activities across 10 plants, and determine and resolve inefficiencies.
- Directed the redesign and implementation of the corporate Intranet site providing key information to employees world-wide, and access to Web-based reporting from decision support databases.

Led over 30 Strategic Information Services staff over one year in the absence of a CIO (position was vacant), reporting directly to one of two of the Chief Operating Officers, setting direction and strategy for IT during this interim period.

Manager, Systems Integration, Strategic Information Services (1997).

Responsible for implementation of cross-functional and wide-scope initiatives ensuring optimal investment in technology, including business-case analysis, price and service-level negotiations, and vendor relationship management. Managed project teams of up to 10 members, including budgeting, task / project planning, tracking, coaching, evaluation, and career planning and development.

- Managed two implementations of a third-party real-time Stock Locator System for North American company-owned warehousing and distribution operations. Implementation cost of CND 300,000 per plant, with 10 sites. Realised annual dumpage savings in excess of CND 100,000 per site, and improved pick-and-pack efficiencies and customer service.
- Lead the design, development, and implementation of a financial modelling and reporting system for regional budgeting and reporting (CND 500,000 initiative) across North American.

Business Systems Application Developer, Strategic Information Services (1994 - 1997).

AETNA LIFE CANADA, Toronto, Ontario. **Systems Integrator / Senior Programmer/Analyst**

1993 - 1994

CANADIAN TIRE CORPORATION, LIMITED, Toronto, Ontario. **PC Applications Developer**

1991 - 1993

GELLMAN, HAYWARD & PARTNERS LTD., Toronto, Ontario. **Information Technology Consultant**

1989 - 1991

ONTARIO HYDRO, Toronto, Ontario. **Nuclear Design Engineer** (Co-op and full-time post-graduation)

1987 - 1989

THORNE RIDDELL and DUNWOODY & COMPANY, Toronto, Ontario. **Professional Audit Staff** (Co-op)

1983 - 1986

Education

Honours Co-operative Bachelor of Mathematics / Computer Science, University of Waterloo. 1989
Studies concentrated in mathematics, computer science, accounting, and psychology.

Additional Achievements, Volunteer Associations, and Other Activities

OUTSPORT TORONTO, Chair. 2010 - Present

CRAG CRUX CLIMBERS, Chair. 2009 - 2010

FIFE HOUSE, Director, Board of Directors, Chair of Development, member of Finance / Audit Committee. 2002 - 2006

GEORGE BROWN COLLEGE, Instructor, Continuing Education Programme, 'C' programming language. 1989 - 1991

Instructor and examiner for National Lifeguard Service, Royal Life Saving Society Canada. Other aquatics and emergency care qualifications and affiliations. Rock climber. Horseman. Sailor.