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ROLES

Portfolio / Program / Project Manager
Organizational Leadership & Innovation Coach
Agile Organizational Transformation Coach
Continuous / Quality Improvement Coach
PMP and SCRUM Coach and Trainer
Product Ownership Strategist
Author of Scrum Tzu Management Philosophy
(PMP) Project Management Professional
(PMI-ACP) Agile Certified Professional
(CSM) Certified SCRUM Master
(CSPO) Certified SCRUM Product Owner
(CSP) Certified SCRUM Professional
(PMP) Project Management Professional
(PMI-ACP) Agile Certified Professional
Network / Infrastructure Engineer
Technology Security, BC/ DR
Technical Debt Reduction Specialist
SysOps / DevOps Consultant
Founder, (IASUG) Agile Scrum User Group
United Nations Project Mentor
FIRST Robotics Team Sponsor / Mentor

HARDWARE / SYSTEMS

Microsoft Networks (MCSE), CISCO (CCNP), Nortel, IDS/IPS, Active Directory, Exchange, SQL, (TFS) Team Foundation Server, proprietary build and test environments. Advanced SysOps and DevOps Cloud Systems like Azure and AWS, Novell Netware 3.12-6, OS/400, RS 6000, RS 9000, various Mainframe Platforms including IBM AS/400, HP 3000, IBM RS6000, Desktop systems such as Mac, Windows Vista/XP/2000/NT/98/95/3.1, DOS, UNIX, Web Metrics Tool, Intrusion Detection/ Intrusion Prevention such as Proventia and DNS.

EXPERIENCE SUMMARY

Portfolio/ Program /Project / Product Management Professional with 20+ years experience working with mature management teams and innovation organizations. Skilled at elevating large portfolios, programs, projects or products with team practices, management techniques, organizational transformation services and continuous process improvement training and coaching. Accomplished at changing organizational cultures as modern management moves toward innovation culture in the workplace. Uniquely qualified to decreased technical debt, foster strategic product ownership and increase team performance, ROI and product output.

SKILLS INVENTORY

- Organizational Transformation, Leadership Coaching, Mentoring and Vision Development
- Portfolio / Program / Project / Product Management
- Strategic Portfolio Alignment / Prioritization Methods
- Product Lifecycle and Roadmap Creation
- Innovation culture methods including Agile / SCRUM, LEAN, Kaizen
- PMI-Waterfall, ISO, HIPPA, SAS-SOX, Six Sigma, and CMMI project management or compliance methodologies.
- Participated on Programming teams utilizing a variety of programming languages (JAVA, C#, Web-Sphere, ASP.NET, PHP, Perl, HTML, XML, Visual Basic, SQL, etc.).
- Participated in organizations that utilize (BDD) Behavior Driven Development, (TDD) Test Driven Development, (XP) Extreme Programming, Formal Business Analysis, (POC) Proof of Concept and others.
- (SOA) Service Oriented Architecture, (ERP) Electronics Records Process –M4, (SAFe) Scale Agile Framework, SAP, (BPM) Business Process Management, a variety of other enterprise technologies.
- Led Infrastructure/ Network / Disaster Recovery assessment and maturity planning
- Advanced Team Building, Mentoring and Conflict Resolution utilizing modern team science methods to suite the team environment and organizational culture.
- Business Continuity and Disaster Recovery identification, planning and maturity.
- Contract Composition and Negotiations with internal and external entities. Superior skill managing implementation vendor projects.
- Systems / Method Trainer that focuses on organizational adoption and transformation as well as the user experience and their comfort with the new technology, process or team structure.

See SCRUMTZU.com for blogs and Agile Thought Leadership Content. Scrum Tzu is the management philosophy I penned which is all about empowering the vision of leadership with the power of organizational knowledge workers to realize impeccable products and services.

Scrum Tzu (8/12 – present)
<u>Scrum Tzu Principal Management and Innovation Coach and Trainer</u>
Variety of Client Coaching Clients, Training and Mentorship Events

- Provide content and thought leadership on the subject of organizational change, leadership structure and center of excellence maturity. Authored an organizational change philosophy focused on delighting the customer with innovative, feature rich products created by engaged teams who are called to continually educate, research and collaborate on new ideas that iteratively materialize in groundbreaking products, services and solutions.
- Provide organizational transformation advice, practical techniques, and on-going coaching assistance to those who want to practice Agile SCRUM, Innovation or Continuous Improvements Culture or other continuous improvement management mechanisms.
- Provide informational classroom training through partnerships with educational institutions such as Iowa State University – CIRAS, Des Moines Area Community College, Iowa Valley Community College, ITT Technical Institute and several others throughout the Midwest. Also, provide on-site classroom training to organizational leadership, middle management like product ownership and scrum masters, as well as team members.
- Founded and facilitated the (IASUG) Iowa Agile Scrum User Group which provide monthly events and build society activities to show case how SCRUM can solve complex challenges when used by self-organized teams. Events are endorsed and affiliated with the SCRUM Alliance, an international organization that sets the standards for SCRUM. In 2016, IASUG collaborated with (ABI) Iowa Association of Business and Industry to highlight (XM) Extreme Manufacturing through build parties that highlight the manufactured products that are created in Iowa such as John Deere Gators, Polaris / Ski-Doo ATV's, Cellular Phones, integrated circuit boards and manufactured toys.
- Composed and coordinated LEAP Teams and Partnership. LEAP is an effort to introduce more young people to Agile, STEM and Advanced Manufacturing Careers. In 2016, Scrum Tzu LEAP sponsored and mentored the Central Iowa: FIRST Robotics Challenge Team, "Agents of Scrum". This team of high school level innovators managed fundraising, business activities, promotions, website and social media communications, design and build of a robot that will complete specific complex tasks. The team was run like an Agile organization with each of the 40 team members receiving formal training, coaching and mentoring. In our rookie year, the team was awarded an invitation to the World Championships and the Rookie Inspiration Award based on our work methods. 40 students finished the season with the ability to be scrum masters and product owners. Scrum Tzu continues to work with this team and actively looks to engage Agile professionals to mentor.

Tech Management Solutions (6/13 – 12/13)
<u>IT SysOps / DevOps Process Improvement PM / Leadership Coach / Contract Scrum Master and Product Owner</u>
Emerson Fisher International -Fisher First 2 Information Systems Improvement Project
- Organizational Transformation Coach and Leadership Development Consultant as well as Product Strategist
- Contract Product Owner and SCRUM Master for the Fisher First 2 Global Software Development Team including the Information Technology Executive Team, business owner, product owner, business analyst, app and systems development and test teams.
- Trained an international development team of approximately 40 members in the Agile SCRUM methodology.
- Worked with the Fisher First 2 Development Team to design a solution to significant technical debt in an effort to lengthen the lifecycle of their order and change management tool, which is their primary interface with clients, and primary sales tool.
- Worked to build leadership and a product development methodology with Fisher First 2 Product Owner building an ordered backlog with a customized, industry specific method for assigning priority that aligns with organizational strategic priorities.
- Worked with Information Technology Engineering Staff to implement a stable SysOps / DevOps Cloud Architecture and eliminate the significant technical debt within the existing distributed systems. Proposed a disaster recovery and business continuity solution and the integration of continuous business improvements.

Tech Management Solutions (1/13 – 3/13)

<u>Information Technology and Application Development Process Improvement Professional</u>

Client Company Organizational Maturity Model Projects

- Organizational Transformation Coach and Leadership Development Consultant with Product Strategy and portfolio alignment as a goal.
- Identified an agile continuous process improvement strategy for Iowa Realty and Hubbell Realty Information Technology and worked to evaluate current results and implementation techniques, organizational roles and management methodologies, such as Agile, as an improvement solution. Recommendations for management standards and improved standard operating procedures outlined in a maturity model for on-going transformational growth.
- Worked as a contract product owner to develop Western Energy SURGE Process Improvements Project Strategy. Worked with Western Energy Group to identify strategies to introduce Agile SCRUM and / or Capability Maturity Model (CMMI) as management mechanisms to measure and forecast schedules, costs and capabilities of teams and technologies. Also worked with vendor to implement (ERP) Electronics Records Process Software and procedures and (BPM) Business Process Management systems.

Tech Management Solutions (10/12 – 12/12)

<u>Project Manager of Process Transformation / Enterprise Risk Assessment</u>

Wells Fargo Mortgage Data Protection Project

- Project Manager performing an audit of a percentage of Wells Fargo Development Test Environments to identify areas of security concern and strategies for improvement. Mortgage data is particularly difficult to duplicate for testing environments forcing mortgage companies to utilize live mortgage data which can introduce considerable liability if physical security, logical security, access control, encryption standards, standard operating practices are not the same as operational systems. The findings of this audit reported to the Operational Risk Assurance Board for Wells Fargo with suggestions for continuous process improvements.
- Leadership Coach and Mentor for Organizational Risk Assessment Leaders who are working to implement new leadership standards of ethics and operational conduct following a very public event concerning customer account security and procedures.

Tech Management Solutions (2/12 – 8/12)

<u>Iowa Medicaid Enterprises- Program Manager of the MMIS Security and Compliance Initiative</u>

National Medicaid Management Information Systems Improvement Project

- Iowa State Operational and Security Plan including ERP, BPM and basic IT Operations for staff. Also worked with national program leadership to determine peer program parameters and options. This work ultimately culminated in the program that the State of Iowa implemented under the name of national healthcare.
- Managed a program team to identify, implement and improve policies, processes and procedures needed to bring Iowa Medicaid Enterprises agency in to compliance with State and Federal standards such as HIPPA, Federal Medical Privacy Act, PCI (credit card compliance method), Six Sigma and CMMI. Worked to improve efficiency and speed to completion with Agile SCRUM practices within the application development units.
- Project managed and provided oversight for the implementation of physical security system and data center security plan which include procedures for access controls, environmental controls, technology infrastructure, facial recognition and fingerprint recognition systems and standard business operational procedures. Managed application development team who coded the National Provider Identification Improvement Project which supported participation in the national records for Medicare-Medicaid ERP. This was the first step in a national ERP Process which was the backbone need to discuss national healthcare.

Tech Management Solutions (2/11 – 9/11)

<u>Project Management Enterprise Correspondence Process Design</u>

Wells Fargo Correspondent Systems Consolidation Project

- Provided Design Lead guidance while researching, documenting and validating business requirements for the enterprise implementation of a new system used to process the correspondent loan population owned and serviced by Wells Fargo Mortgage. Assisted in requirements versus design matrix, (UAT) User Acceptance Testing and implementation activities. Initiated, defined and managed project work stream plan including budget, financial forecast, resource pools, program/project progress and continued business process monitoring and improvement.

Tech Management Solutions (9/10 – 10/10)

Business Analyst/ Agile Transformation Study Project Manager /Compliance Auditor

AVIVA Enterprise Capacity Planning Project

- Project managed an effort for the AVIVA IT Executive Committee to implement an enterprise project management methodology and techniques to maintain it. The goal was to define a method managing resource / project data including quantity of resources, identification of projects (active and in-active), as well as any other operational tasks and initiatives which are consuming these resources. Requirements were collected and an Agile Chief Product Owner concept was adopted coupled with a technology solution within their Hewlett Packard Project Management Suite. These new solutions will allow for organizational portfolio prioritization and management, ROI calculation, performance metrics and resource demand forecasting, while working with more than one Product Owner.
- Designed a capacity management maturity plan for the committee to use going forward with staff transitions.
- Worked to assemble framework for documentation and training, which was to be delivered to all roles that will utilize processes and procedures within the new standard operating method.

CDS Global- Hearst Corporation (12/07 – 6/10)

Agile Product Owner / SCRUM Master and Organizational Transformation Coach (contract then full-time)

Print On Demand Division

- SCRUM Master and Organizational Transformation Coach for the On Demand Web Design and Application Development Group for CDS Global division of the Hearst Corporation. Implemented a new web technology product for our clients and prepared to bring this technology product to the market. On Demand Web Product provided clients a variable data engine with the capability to produce highly customized business products like insurance policies, books, informational and marketing materials.
- Organizational Transformation Coach and Leadership Development Consultant
- Project Manager of the materials production facility transformation to LEAN, HIPPA and newly mandated corporate security requirements. This facility would integrate with On Demand Websites and make customized products available to client through a custom designed production process. Improved the Kaizen Process and (MDI) Managed Daily Improvement activities.
- Worked with clients to design solutions for utilization of extracted data assets and provided business analysis, user stories and requirements composition for the On Demand Web Team.
- Enterprise Project Management Office reporting of project timelines and change controls while introducing CDS Enterprise Project Management Office to Agile SCRUM. Responsible for change control, budget reporting and portfolio impact analysis and risk assessment.
- Developed and automated all SCRUM project artifacts including test scenario database and accompanying scripts to optimize testing of code and an automated code promotion process.
- Product Owner of On Demand Technical Products. Composed Products Lifecycle / Roadmap and performed all prioritization and backlog maintenance based on feedback from sources such a s clients, testing results, compliance and regulatory changes as well as audit findings.
- Composed product marketing materials and standard language database for use with RFP-RFI responses and for distributable marketing materials.

Tech Management Solutions (06/06-11/07)

Project Manager – Technical Engineer

Microsoft Solutions Provider- Special Product Introduction Project

- SCRUM Developer / Technical Engineer implementing a rules engine to be widely utilized in the Amalga / Med-Star Medical Organization and George Washington University Hospital pilot test sites (100,000 users). This rules engine was built to interact with clinical level personnel to encourage quality improvement changes indicated in the National Hospital Compare Regulations. Worked with Department of Health and Human Services to develop a technology management strategy for the National Hospital Compare data and reporting mechanism for data.
- Technical Development Project Manager / Account Manager to compose RFPs, SOW's and Project Plans for a Microsoft Solutions provider.

Genesis 10 (11/06-5/07)

Project Lead / Work Plan Management

Well-mark Blue Cross Blue Shield

- Project Leader of an application development team organized for an implementation project, which would bring to market a Wellness and Lifestyle Management Product. This product would target new and existing Well-Mark clients and provide a customized electronic health record, disease management and access to nursing resources via web portal. Utilized waterfall methodology to manage the main project, creating and modifying Well-mark process and procedures to support this effort and documenting the path to maintain these products in future operations such as IVR processes and scripting, solutions knowledge base population and call desk procedures manuals.

Genesis 10 (05/07-12/07)

Project Manager

Principal Financial Group

- Project Manager of the Information Services Data Center Project Team developing a Data Center Strategy for 2008 through 2010. Strategy details included municipal partnerships, appropriate location for the facility as it related to user experience, data transaction time and corporate disaster recovery strategies and fiber connectivity.
- Project Manager of the (SOA) Service Oriented Architecture Infrastructure and Strategy Team developing and implementing a framework for SOA on distributed systems and the mainframe environment, as well as, governance and training of end users. Once the framework and governance structure were in place, we conducted a software vendor search and purchased, implemented and configured SOA Software.

Tech Management Solutions (12/05- 1/07)

Project Manager

Iowa Foundation for Medical Care

- Agile and Waterfall Project Manager with the Application Development Team (JAVA, .NET, C+, Performance Point and BizTalk Projects) to provided newly developed software products and Website Services to the Department of Medicare and Medicaid Services. Responsible for managing portfolio of a variety of technical projects including code development, technical debt tasks, as well as, a (SOA) Service Oriented Architecture project which assisted the different development areas in utilization of shared resources, consistency in look and feel.
- Senior Process Improvement Consultant for the Enterprise Project Management Office with focus on developing a Project Management Lifecycle to work with the existing System Development Lifecycle. This compliance was required to maintain contracts with Department of Medicare and Medicaid Services combination of HIPPA, ISO, CMMI, Six Sigma and Waterfall Project Management Methodology.