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**Summary**

Results-driven Program Manager with 25 years of experience in leading system transformations across insurance, banking, mortgage, health, and hospitality sectors. As a Solutions Architect and Test Manager, I have successfully delivered infrastructure and testing automation frameworks, utilizing Pega PRPC to enhance operational efficiency. With over 20 years in program, project, and test management roles, I have a proven track record of guiding cross-functional teams to achieve project objectives and drive business success, exemplified through my tenure at AON Insurance Agency. My leadership fosters collaboration and innovation, ensuring the successful delivery of complex projects and products.

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**Skills**

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| * Leadership * Analytical Thinking * Communication * Adaptability * Collaboration * Virtual Servers: Ubuntu, Red Hat * Transformation | * Test Management * Pega Expertise * Quality Assurance * System Business Analysis * Credit Card Operations * Cloud Interfaces: AWS, IIS, Heroku * Ruby on Rails, HTML, SQL |

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**Experience**

Program Manager - Release Management | 05/2024 - 09/2024

**Bank of America**

* Managed multiple concurrent projects, ensuring readiness for monthly release cycles by tracking timelines, system impacts, and key delivery milestones using Atlassian Confluence to build comprehensive tracking grids.
* Coordinated cross-functional release activities, collaborating with delivery managers, duty managers, and stakeholders to align schedules and maintain clear communication on project builds, configurations, and time windows through the Remedy Platform.
* Oversaw the integration of Agile (Scrum, SAFe), Kanban,and Waterfall methodologies, leveraging tools such as Excel and JIRA for meticulous tracking and reporting to ensure efficient project delivery and stakeholder alignment.

Program Manager Infrastructure Integration | 09/2023 - 05/2024

**Bank of America**

* Managed multiple complex projects to support the development and positioning of a new integration engine, becoming the 2nd largest in the infrastructure ecosystem, by creating server architecture documentation and workflow hierarchies.
* Coordinated and streamlined the integration of servers and data flow across platforms, enterprise applications, and customer banking services, ensuring seamless server identification, operation, and functionality tailored to meet banking infrastructure requirements.
* Utilized Atlassian Confluence to design and edit custom pages for comprehensive tracking of project releases, maintaining adherence to schedules through updates and status calls, and overseeing the step-by-step workflow of new server builds transitioning to production.
* Most applications and infrastructure are managed in various cloud environments .. Depending upon the needs of the application, different methods might be used such as Azure, AWS, IBM.for the resident virtual machines.

Solution Architect Performance and Capacity Management | 07/2018 - 07/2023

**Bank of America**

* Managed the intake and implementation of customer-facing projects that impacted critical banking applications and business processes, ensuring alignment with solution architecture standards and readiness for planned releases.
* Conducted comprehensive workflow analysis and identified gaps for remediation in projects influencing performance and capacity, including upgrades and enterprise implementations, while maintaining documentation readiness as defined by project delivery requirements.
* Provided cross-system (end-to-end) analysis and support to banking domains, collaborating with product owners, capacity planners, developers, and testers, leveraging Confluence for tracking project status, readiness, and release updates.
* Most applications and infrastructure are managed in various cloud environments .. Depending upon the needs of the application, different methods might be used such as Azure, AWS, IBM.for the resident virtual machines.

Global Test Data Manager | 07/2016 - 03/2018

**Intercontinental Hotels Group**

* Led service integration, solution architecture, and process alignment for global test data management, streamlining end-to-end testing and release processes for hotel property data through automation, resulting in projected savings of $1.75-$2 million in the first year.
* Introduced and automated the CA Test Data Manager platform, including Javelin for data integration, enhancing test data coverage across property management, reservations, loyalty, and membership channels, while overseeing tool architecture, design, installation, and multi-server development.
* Partnered with project managers and system leads to capture functional requirements and create strategic solutions, ensuring on-time delivery and improving speed to market and production quality, while tracking test data requirements, service availability, and system delivery.
* The cloud in this project was owned by the French company with whom I SG had signed a contract to handle the dated offsite. It was a proprietary company with their own cloud.

Pega Technical Program Manager | 02/2016 - 06/2016

**Blue Cross Blue Shield - IL**

* Coordinated integration and services resources to deliver claims processing solutions for BCBS, overseeing requirements and architectural reviews to ensure alignment with system integration needs and business workflows.
* Prepared comprehensive use cases to support epics and user stories for each sprint, and facilitated effort estimations, mentoring teams on Agile methodologies, Pega architecture, system analysis, and service-oriented architecture (SOA) relationships.
* Managed risk assessments and performance considerations during business requirements, architectural sessions, and the design of new functionalities, ensuring high-quality outcomes for health insurance claims processing.

Pega Business Architect | 10/2015 - 02/2016

**Anthem WellStar Blue Cross Blue Shield**

* Led the management of requirements and architectural reviews, conducting detailed walkthroughs with business stakeholders to capture and clarify requirements, architecture, and system integration specifics for health insurance claims processing.
* Prepared detailed use cases to support epics and user stories for each sprint, organized sprint effort estimations, and mentored teams on Agile practices, Pega architecture, system analysis, and SOA relationships to ensure project alignment and efficiency.
* Addressed risk and performance considerations during business requirements and architecture sessions, contributing to the design of new functionalities and enhancing system reliability and performance for claims processing solutions.

Sr. Business Architect | 03/2015 - 09/2015

**nextSource**

* Managed comprehensive data analysis and mapping efforts using Kibana, Elasticsearch, Mulesoft, and PHP to support system transformation projects within a vendor management service framework.
* Led business architecture and process analysis, including the design, re-design, and end-to-end test data management for data transformation initiatives, ensuring seamless integration and optimized workflows.
* Conducted RESTful API endpoint analysis, legacy application reverse engineering to REST methods, URI resource assignment, and object model mapping, contributing to Agile sprints through sizing and execution as an active team member.
* Most applications and infrastructure are managed in various cloud environments .. Depending upon the needs of the application, different methods might be used such as Azure, AWS, IBM.for the resident virtual machines.

BPM Pega PRPC - BPM Practice Start Up Advisor | 09/2014 - 11/2014

**CIGNITI**

* Developed a comprehensive business plan for establishing a new Pega PRPC BPM practice, outlining strategic objectives and actionable steps for successful implementation.
* Created a detailed roadmap for deploying Pega methodology, including marketing strategies, stages of practice growth, and revenue projections, to ensure sustainable expansion and profitability.
* Conducted in-depth business analysis and architecture planning, defining budget requirements and timelines to align with organizational goals and secure a structured development process.

Test Manager Data Transformation | 02/2014 - 05/2014

**Liberty Mutual Insurance Company**

* Developed and executed a comprehensive strategy for automating the replacement of the mainframe policy administration application, enhancing operational efficiency and data processing capabilities.
* Designed a robust data comparison tool to validate data outputs between the legacy mainframe system and an Oracle database, ensuring accuracy in policy processing during the transition to the new policy application.
* Implemented test automation utilizing ALM, UFT, and BPT modules, streamlining testing processes and improving overall data quality assurance during the data transformation initiative.

Pega PRPC Sr. Project Manager | 01/2013 - 01/2014

**Fireman's Fund Insurance Company (Zurich)**

* Designed and collaborated with FFIC leadership to implement eWorkflow within the Pega system, ensuring alignment between business architecture and functional requirements through detailed use cases and specifications using Directly Capture Objectives (DCO).
* Coordinated efforts between business analysts and senior business architects to align requirements and development activities, facilitating clarity and communication throughout the project lifecycle from initiation to transition phases.
* Conducted Joint Application Design (JAD) sessions to gather requirements and wireframes, creating use case reviews and UI mock-ups with FFIC subject matter experts, while utilizing best practices in BPM testing and rapid deployment for functional, component, integration, end-to-end, and user acceptance testing
* Hybrid environments-some on local but most applications and infrastructure are managed in various cloud environments .. Depending upon the needs of the application, different methods might be used such as Azure, AWS, IBM.for the resident virtual machines.

Pega PRPC BPM - Performance Architect and Assessment - Guidewire Claims Center | 04/2012 - 01/2013

**ICBC - Vancouver, Canada**

* Led performance and business architectural assessments of the Guidewire Claims Center, evaluating risk factors and system performance for the ICBC legacy system to inform strategic planning and implementation.
* Developed comprehensive project strategies and plans, including effort estimations and performance test design documents, while creating user characteristics models (UCM) to align with business needs and enhance system efficiency.
* Collaborated with ICBC product SMEs, including business analysts, developers, and product owners, to conduct business analysis using Directly Capture Objectives (DCO) in Pega, resulting in detailed workflow documentation that supports system enhancements.

QA Project Manager - Temenos T24 / Lead Business Architect / BA | 08/2011 - 04/2012

**Vancity Credit Union - Vancouver, Canada**

* Managed the implementation of the Temenos T24 Core Banking System in Vancouver, BC, developing comprehensive test strategies and plans to ensure product verification and alignment with business and system architecture requirements.
* Collaborated with cross-functional teams to define and refine business architecture, ensuring that testing processes effectively supported system architecture and core banking functionalities throughout the project lifecycle.
* Led quality assurance efforts by establishing and monitoring KPIs, facilitating stakeholder communication, and ensuring that all testing activities aligned with project objectives and regulatory compliance standards.

Lead Business Architect / BA, Testing Manager / TDM | 08/2010 - 03/2011

**Bank of Montreal (BMO) - Toronto, Canada**

* Led the migration and implementation of the Diners Card portfolio from TSYS to TSYS conversion across Toronto and Montreal, ensuring a seamless transition and alignment with business objectives and system requirements.
* Managed test data provisioning and coordination for both Diners and TSYS portfolios, developing robust test data management strategies to ensure comprehensive testing and data integrity throughout the migration process.
* Collaborated with stakeholders and cross-functional teams to define business architecture and testing strategies, facilitating effective communication and ensuring that all testing efforts met project timelines and quality standards.

Project Manager - Testing and Implementation / Sr. BA - New VISA Card system | 04/2009 - 08/2010

**Presidents Choice Financial (Loblaws)**

* Managed the implementation of a new credit card program utilizing the TSYS TS-2 system, overseeing business workflow and conducting thorough system analysis of PCF banking operations to ensure alignment with project objectives.
* Led functional mapping of lines of business (LOBs), developed wireframes, and defined critical paths while prioritizing use cases, effort estimation, and re-planning efforts for an offshore team of 70 members to optimize project delivery.
* Coordinated test data management initiatives, collaborating with testing teams, database administrators, and developers to create tailored test data sets for system integration testing (SIT), end-to-end (E2E) testing, and user acceptance testing (UAT) to ensure comprehensive validation of the new system.
* Most applications and infrastructure in credit cards are managed in various local and cloud environments .. Depending upon the needs of the application, different methods might be used such as Azure, AWS, IBM.for the resident virtual machines.

Testing Project Manager BI / ETL Data Migration / TDM | 09/2008 - 02/2009

**CNA Insurance**

* Oversaw test data management and preparation for ETL processes in the migration of Business Intelligence data to production, ensuring accuracy and consistency in data handling throughout the policy administration platform delivery.
* Collaborated with stakeholders to gather requirements and develop comprehensive test management strategies, facilitating effective communication and ensuring alignment with business objectives during the data migration process.
* Managed the end-to-end testing lifecycle, coordinating testing efforts for data quality, validation, and performance, while implementing best practices in test data management to optimize the efficiency and effectiveness of the BI/ETL project.

PEGA PRPC BPM - Project / Test Manager | 01/2007 - 02/2008

**AIG Agency Auto**

* Managed and implemented PEGA PRPC versions 4.3, 5.0, 5.5, and 6.2, overseeing the end-to-end testing process and ensuring robust implementation of business rules and requirements through automated robotic process automation (RPA) solutions.
* Collaborated with cross-functional teams to align requirements with use cases, data models, wireframes, and workflow designs, effectively managing strategy, planning, and delivery for the Policy Administration Platform.
* Led quality assurance management efforts for functional, integration, end-to-end (E2E), and user acceptance testing (UAT), utilizing test data management strategies that incorporated subsets of production data to validate business analysis and architecture during the UAT phase.
* Most applications and infrastructure in credit cards are managed in various local and cloud environments .. Depending upon the needs of the application, different methods might be used such as Azure, AWS, IBM.for the resident virtual machines.

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**Education**

**University of North Texas – Music Composition**

BA - non completed, 1975

**More about my earlier Insurance Experience**

I was raised in the Independent Insurance Agency business owned by my family. And when I got out of college, I entered the insurance agency business with my family in 1974 and I worked with them for six years, licensed to sell P&C, group, health and life, life, disability, and individual health, and NASD securities. Following that I went to work for AON (at the time was known as Alexander and Alexander of Texas) for two years in 1980-81.  I WAS Hired AT AGE 31 AS A National Account Agent/Representative for the

FLEMING FOOD CORPORATION, I acted like the manager for their benefits package.

I CREATED THE PACKAGE - the level of benefits, did the entire rating/experience analysis to create a race structure to support the program, and I told Travelers how to charge the customer for the benefits.

I then went on the road throughout the Midwest USA and sold it to each grocery store serviced by Fleming. Furthermore, I worked with the client to create a captive insurance company offshore to replace the present benefit structure and other insurance coverage for the first $10 million 1981.