

**JAMES MCGREEVY, PMP**  
**8858 HOLLY LANE, OLMSTED FALLS, OH**  
**440-364-9200**

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**Senior Program/Project Manager/Portfolio Management, PMP**  
**Project Management • Professional Application Development • Quality Assurance • Testing**

- Influential technology leader, working comfortably with C-level management to shape strategic direction and long-term vision.
- Broad technical and strategic background, skilled at working with corporate leaders and staff to introduce technology and translate complex business requirements into robust cost-effective technology solutions.
- Demonstrated expertise in planning, selecting, acquiring, implementing and supporting corporate information systems while optimizing cost/benefit performance.
- PMI Certified Project Management Professional, as well as significant experience using the AGILE methodology.

Executive Presentations  
Software Development/SDLC  
Consulting  
Program/Project Management/PMI  
Training/Development  
Strategic Planning  
Infrastructure/Upgrades

Business Requirements  
Data Governance/Meta Data  
Jira/Confluence/PPM  
Needs Assessment  
IT Strategy Maps  
Vendor Relations  
Deployment/Migrations

Process Improvement  
Budgeting  
Cost/Benefit Analysis  
Contract Negotiations  
QA/Testing  
Disaster Recovery  
Data Communications

**EXPERIENCE**

**9/21 – Present**

**Charles Schwab & Co., Cleveland OH**  
**Senior Program/Project Manager, Contract**

Leading provider of securities, brokerage, banking, money management, and financial advisory services through its operating subsidiaries,

- Senior Project Manager within the Schwab Smart Processing program. The project's goal is to deliver optimized Client/Advisor experience and scalable processing readiness for non-digital requests through end-to-end assessment and improvement of the full document intake ecosystem (Channels, Forms, Operations, etc.). The approach will leverage vendor technology to enable optical rule based exception processing. Teams used a combination of Waterfall and Agile methodologies. **5 workstreams in program consisted of 50+ resources with an annual budget of \$6.6 million.**
- Managed cost, schedule, and resources using Clarity PPM tool. Tracked resource costs, schedule, and time using PPM tool. Created monthly reports for Senior Management reflecting cost, schedule, and scope.
- Used Jira and Confluence to work with Product Managers and Scrum Managers to define project Epics, User Stories, product backlogs, sprint planning, task breakouts to define sprint backlogs. Also used Jira and Confluence to define and track program issues and risks.
- **Technologies utilized included:** Jira, Confluence, Share Point, Hyper Science, Docusign, Adobe Experience Manager, and Clarity.

**4/20 – 8/21**

**PNC Bank, Cleveland OH**  
**Senior Portfolio/Project Manager, Contract**

PNC is a bank holding company and financial services corporation based in Pittsburgh, Pennsylvania. The company also provides financial services such as asset management, wealth management, estate planning, loan servicing, and information processing.

- Senior Project Manager for the PNC Marketing Decision Technology Platform. The platform provides the capability to enable customer-centric experiences to grow relationships and

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business value. The heart of the marketing capability consists of Pega Inbound/Outbound marketing, Salesforce Marketing Cloud, and Offer Management. This is an ongoing development effort to ensure improvements in marketing effectiveness. Teams used a combination of Waterfall and Agile methodologies. **3 Teams consisted of 36 resources with an annual budget of \$5 million.**

- Senior Project Manager for the PNC Marketing Data Management team. This team was responsible for proving marketing/supporting data for various marketing teams across the enterprise. Teams used a combination of Waterfall and Agile methodologies. **2 teams consisted on 13 resource with an annual budget of \$2.5 million.**
- Managed cost, schedule, resources using Clarizen's PPM tool. Tracked resources costs, schedule, and time using PPM tool. Created weekly reports for Senior Management reflecting cost, schedule, and scope.
- Used Jira and Confluence to work with Product Manager and Scrum Master to define project Epics, User Stories, product backlogs, sprint planning, and task breakouts to define sprint backlogs.
- Scheduled weekly/monthly deployments as needed.
- **Technologies utilized included:** Java, .NET, Clarizen, Jira, Confluence

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**7/18 – 1/20**

**Timken, Canton, OH**  
**Senior Portfolio/Project Manager, Contract**

Timken is a world-leading manufacturer of bearings and mechanical power transmission products. Business & Technology initiatives include:

- Portfolio Manager tasked with realigning existing projects to redefine scope and schedule as well as train offshore Project Manager to take over projects.
- Tasks included redefining existing schedule and tasks for enterprise wide Windows 10 OS upgrade, migration to MS Office 365, and replacing Timken's standard laptop from Lenovo's to HP (various models).
- Redefined cost, schedule, and resources needed for the 3 existing projects to more realistic expectations.
- Worked with Timken's vendors to define roll out plans and support processes for upgrades and laptop replacements
- Trained new offshore PM to execute and maintain redefined project plans.

**2/17 – 4/18**

**BNYMellon, Pittsburgh, PA**

Worldwide banking and financial services company, the world's largest custodian bank. Business & Technology initiatives include:

**Senior Portfolio/Program Manager, Contract**

**8/17 – 4/18**

- Portfolio/Program Manager in support of BNYMellon's Enterprise Data Governance Office.
- Program consisted of several projects managing the development and enhancements of interfaces between existing business applications and the banks data governance tools including Informatica Metadata Manager & Data Quality, and NEXEN reporting tools. **Teams used a combination of Waterfall and Agile methodologies.**
- Duties include working with business and technical stakeholders to identify and prioritize corporate wide applications to be on boarded into existing data governance environment.
- **Used Jira and Confluence to work with Product Manager and Scrum Master in India to define project Epics, User Stories, product backlogs, sprint planning, and task breakouts to define sprint backlogs.**
- **Tracked 3 week sprints using burndown/up charts, daily scrum meetings, and sprint reviews. Facilitated sprint retrospective at conclusion of each sprint.**
- **Identify risks and issues to both business and technical stakeholders. Contract position with personal responsibility for \$6M+ annual budget.**
- Direct reports include 30+ resources including full time employees, on-site and offshore contractors.
- **Managed cost, schedule, resources using HP's PPM tool. Tracked resources costs, schedule, and time using PPM tool. Created weekly reports for Senior Management reflecting cost, schedule, and scope.**
- Delivered successful upgrades of three existing Data Governance Tools environments including Collibra 5.2, Informatica Metadata Manager 10.1 and Informatica Data Quality 10.1
- Successfully on boarded over 50 applications into the Data Management Architecture environment, which includes integrating existing business applications into the Informatica Metadata Manager and Data Quality environments.

**Program Manager, Contract**

**2/17 – 8/17**

- Program Manager in support of 12 sub-projects belonging to a corporate wide Legal Agreement Repository program.
- Program is in support of the SR-14 Federal Reserve Board regulatory requirement which requires

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globally significant domestic bank holding companies to remediate gaps in their resolvability plans.

- Successfully oversaw the management of a series of 12 interface projects from separate lines of business (LOB) within BNY Mellon.
- **Manage projects using Waterfall methodology and created project plans using MS Project.**
- **Interfaces utilized custom written API's and middleware to insert significant client contracts into an existing Legal Agreement Repository.**
- **Contract position with responsibility for \$3M+ annual budget. Direct reports include 25+ resources including full time employees, on-site and offshore contractors.**
- **Managed cost, schedule, resources using HP's PPM tool. Tracked resources costs, schedule, and time using PPM tool. Created weekly reports for Senior Management reflecting cost, schedule, and scope.**
- Delivered 12 new automated interfaces from separate LOB's into the Legal Agreement Repository.

**Technologies utilized included:** Java, C#.NET, MS SQL, VB Script, and SEAL Contract Repository Software

**2/16 – 8/16**

**Key Bank, Brooklyn, OH**  
**Senior Portfolio / Project Manager, Contract**

Leading provider of banking, money management, and financial advisory services through its operating subsidiaries. Business & Technology initiatives include:

- Tasked with full responsibility to drive and deliver a sub-project belonging to a corporate wide program.
- Successfully delivered the enhancement of an existing Enterprise Alert Platform.
- Direct reports include 23 resources including full time employees, on-site and offshore contractors.
- **Enhancements included the addition of several new email-based alerts, as well as 15 new SMS based alerts. 6-month contract with personal responsibility for \$1.2M+ budget.**
- **Created and tracked budget using HP's PPM tool.**
- **Used Jira and Confluence to work with Product Manager and Scrum Master to define Project Epics, User Stories, product backlogs, sprint planning, and task breakouts to define sprint backlogs.**
- **Tracked 3 week sprints using burndown/up charts, daily scrum meetings, and sprint reviews. Facilitated sprint retrospective at conclusion of each sprint.**
- **Managed cost, schedule, resources using HP's PPM tool. Tracked resources costs, schedule, and time using PPM tool. Created weekly reports for Senior Management reflecting cost, schedule, and scope.**
- Delivered new email and SMS based customer alerts as part of an existing Enterprise Alert Platform.
- Platform integrated with many other applications both inside and outside of Key Bank's environments.

**Technologies utilized included:** Java, WebMethods, DataPower, mBlox, and ODM

**1/11 – 2/16**

**Charles Schwab & Co., Richfield, OH**  
**Senior Program / Project Manager, Contract**

Leading provider of securities, brokerage, banking, money management, and financial advisory services through its operating subsidiaries.

- Tasked with full responsibility to drive and deliver several sub-projects related to enhancing a low-cost offering for the 401(k)-market utilizing Exchange Traded Funds (ETFs) or Index Mutual

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Funds (IMF) as the core investment choice for plan participants.

- **\$6M annual program budget with personal responsibility for \$2M. Direct reports include 20 resources including employees, on-site and offshore contractors.**
- **Project utilized Waterfall methodology as well as transitioning some sub-projects to Agile.**
- **Managed cost, schedule, resources using Clarity's PPM tool. Tracked resources, costs, schedule, and time using PPM tool. Created weekly reports for Senior Management reflecting cost, schedule, and scope.**

**Business & Technology initiatives include:**

- **Defining and implementing PMO processes utilizing both PMI and Agile techniques.**
- Monitoring and controlling other PM's projects as well as individual projects.
- Requirements gathering, use case surveys, risk management, requirements documentation, scheduling, reporting, budgeting, project and expense tracking, governance, technical collaboration, QA, and release.
- Delivered .NET-based 401k loan application and disbursement system.
- Delivered MS SQL based table archiving and reporting system utilizing MS SSIS and SSRS tools.

**1/10 – 12/10**

**Progressive Insurance, Mayfield Village, OH**  
**Senior Program Manager, Contract**

- Managed team of System Architects and Security Analysts in the definition of an enterprise wide security architecture program. This program consisted of 10 projects that defined the business and technical requirements. The projects included enterprise wide identity and access management architecture, application and data encryption, creation of an enterprise data catalog, the remediation of specific SOX and PCI compliance issues, and data sanitization of sensitive customer data. The definition of this program included compiling estimates of labor hours, labor cost, timelines, dependencies, and capital expenditures. The overall program budget was \$17 million over two years.
- Worked with business and IT stakeholders to define scope and requirements for enterprise wide security enhancements.
- Created cost benefits analysis for entire program and well as 10 individual sub-projects.
- Developed functional and technical design documentation.
- Created analysis, development, and implementation schedule.
- Identified and managed risks to the project, performed formal quantitative risk analysis.

**2/08 – 12/09**

**United States Mint, Washington, DC**  
**Senior Program/Project Manager, Contract**

- **Contracted to lead a team of 35 Developers on the \$12M maintenance and enhancement project for the CommercialWare Direct Order Manager System including Business Intelligence reporting.**
- **Managed cost, resources, and risk analysis of projects utilizing EVM, and PMI(Waterfall) Methodology.**
- Successfully transitioned OMS interface to new Warehouse Management System (WMS). Reduced shipping costs by 25%.
- Created enhancements to OMS in support of Sales channels including web-based orders, call center orders, and mail orders.
- Collaborated with business stakeholders to define scope and requirements.
- Tested application and managed overall quality assurance.

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**1998 – 2007**

**Seagull Software Systems, Inc., Atlanta, GA**  
**Managing Consultant**

- Designs, develops, and markets legacy application management solutions.
- Enables front-end integration, legacy integration, data migration, statistic reporting, and technology management services.
- Trusted Advisor led cross-functional teams in the execution of technology-based projects utilizing PMI methodology.
- Customers encompassed Insurance, Trucking, Healthcare, Banking, and State & Local Governments.

**8/96 – 9/98**

**Ernst & Young LLP, Cleveland, OH**  
**Manager**

- Successfully drove and delivered technology-based projects including an auto insurance call center application, interfaces to Equifax, TransUnion, and US state agencies for the real-time retrieval of credit reports, credit scores, and MVR & CLUE reports, and the technology integration of 8 hospitals including HL7 implementations.

**1994 – 1998**

**Bear, Stearns, & Co, Chicago, IL**  
**Vice President / Software Application Developer**

**1990 – 1994**

**Whitman-Hart LLP, Chicago, IL**  
**Consultant / Software Application Developer**

**EDUCATION**

Bachelor of Science, Computer Science, Ohio University, 1989

**PROFESSIONAL CERTIFICATION**

PMP, Project Management Professional