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Qualifications Summary

A unique, client-facing professional skilled in formulating business and functional transformation strategies, developing business cases and establishing key performance indicators, conducting operational assessments, and identifying process improvement opportunities, and planning and managing organizational and Human Resources/Payroll change initiatives.

Transformation Project Experience

My specific experiences span corporate positions in information technology, finance and accounting, and human resources and consulting engagements with over 100 organizations of various sizes and across multiple business sectors. Highlights include the following project management/leadership roles:

- **For Business Solution Technologies (a Hawaii-based consultancy)** – Led a team that supported our client’s Human Resources technologies including new application development, modifications, and upgrades. Acted as point of contact for clients in the HR/HRIS pillar of the business.
- **For Na Hoku (a Hawaii-based jewelry manufacturer and retailer)** – Developed business processes for the corporate functions to coincide with the implementation of a new Microsoft NAV enterprise resource planning system (ERP). Designed the user interface and navigation of a new point of sale system and managed the development, testing, and pilot phases of the project. Developed key performance metrics and associated dashboard for corporate functions (including Customer Service and Distribution). Lastly, developed a request for proposal for a new VoIP telephone system and managed the evaluation of proposals.
- **For Pictures Plus (a Hawaii-based diversified retail and wholesale manufacturer)** - Designed, developed, and delivered a multi-module training program for the company's management team focusing on talent management, store-level financial management, personal leadership development, and retail sales management.
- **For the New York City Department of Education (the nation’s largest K-12 public school system)** – Led a \$7M transformation project that included: development of a more effective Human Resources service delivery model based on results of an initial assessment; mobilizing and leading an integrated team of consultants and client staff during a comprehensive, multi-year design and implementation effort; and launching a state-of-the-art service center to support the system’s principals and teachers. (Full case study available on request)
- **For KeySpan Energy (a regional utility company)** - Project leader for a \$4.2M Human Resources functional transformation initiative. Project included a comprehensive current state assessment and transformation business case (payback period was 2.7 years) followed by a detailed design and implementation phase. Design and implementation phase included the deployment of case and knowledge management tools, redesign of roles and responsibilities for the service center team, improvement of customer-facing and operational processes, and a branding campaign to launch the new service delivery model. (Full case study available on request)
- **For M&T Bank (a regional financial institution)** - Project leader for a comprehensive Human Resources transformation assessment and road map. Project included an activity-based cost analysis, interviews with top executives to validate strategies and associated improvement opportunities, process redesign, and the development of a new service delivery model and implementation roadmap. The associated business case outlined a \$9.4M investment with the potential to generate \$1.7M in annual cost savings.
- **For Pepsi Cola (an international beverage company)** - Led multiple acquisition integration teams focused on the implementation of daily route settlement process and systems for recently acquired bottling businesses. Also led a major corporate transformation initiative focused on improving processes through technology enablement.
- **For Hoechst Celanese (an international chemical and pharmaceutical company)** – Lead analyst on an acquisition integration team that consolidated financial reporting for a \$5.2B entity.

Project Management

- Managed projects of various size and complexity including accountability for the following:
 - Developing project plans (MS Project)
 - Tracking key project milestones
 - Identifying project risks and escalating issues for resolution
 - Communicating with project stakeholders
 - Managing project financials to achieve budgetary objectives
- Managed a multi-year \$7M Human Resources transformation project that included 25+ team members across 4 project workstreams. In addition, conducted quarterly project review meeting with external project funders to ensure project stayed on track and delivered expected results.

Key Attributes

- Strategic thinker with 30+ years of experience interacting with executives at all levels
- Deep project management experience having been involved in full project life cycle from concept to implementation
- Worked in and/or with corporate Finance, Human Resources/Payroll, and IT functions
- Versed in enabling technologies to improve the delivery of Human Resources and Payroll services
- Excellent communication skills including developing and delivering presentations and all other forms of business writing
- Able to apply financial discipline to evaluate alternative investments and develop a business case for action
- Keen ability to sort through information/data to identify key trends and formulate conclusions
- Able to identify and quantify the drivers/KPI's that will determine the success of organizational initiatives
- Passionate about finding ways to improve people, process, and technologies to gain efficiency and effectiveness
- Skilled at listening to others and building collaborative relationships

Employment History

My employment history includes both internal and consulting positions with the following organizations:

Consulting and Project Management

ProService Hawaii, **Project Manager** (June 2022-Present)

Business Solution Technologies, **Director HR Innovation** (March 2020-April 2022)

Na Hoku, **Organizational Transformation Consultant** (July 2017- December 2019)

Towers Watson, **HR Service Delivery Sales Leader** (Sep 2011-Oct 2012)

The Hackett Group, **Senior Director, HR Transformation** (May 2010-Aug 2011)

Mercer, **Principal, HR Effectiveness Segment Leader** (Jul 2004-May 2010)

Watson Wyatt Worldwide, **Senior Consultant, Technology Solutions Practice** (Jun 2000-Jul 2004)

The Hunter Group, **Senior Consultant, Management Consulting Practice** (Apr 1995-Jun 2000)

IT/Finance/Accounting/Manufacturing/Retail Sales

The Art Source dba Pictures Plus – **Director of Business Improvement Projects, Division Manager** (Jan 2013-Jun 2017)

Pepsi Cola., **Mgr. Business Planning, Reengineering Leader, Field Systems Project Leader** (Sep 1989-Apr 1995)

Hoechst Celanese, **Manager of Planning and Budgeting, Senior Planning Analyst** (Mar 1984-Sep 1989)

Eastman Kodak Company, **Financial Systems Analyst** (Jan 1982-Mar 1984)

Education

BS, Management Information Systems/Economics, *cum laude* State University of New York at Albany

Professional References

Mr. Kent Untermann – President and CEO of The Art Source Inc. (dba Pictures Plus)

Mr. Ed Sultan – President and CEO of Na Hoku

Mr. John Weldon – President of Business Solution Technologies