**SENIOR PORTFOLIO / PROGRAM / PROJECT / PRODUCT MANAGER**

**software / rdbms development ♦ enterprise implementations ♦ systems engineering ♦ it infrastructure**

* **Senior Portfolio / Program Manager** with 14+ years in Program Strategy, Planning, Governance, Business Vision, Product Featuring, Road-mapping, Prioritizing Features, Management; 12 years prior experience in Business Systems Analysis and 4 years in Technical Development.
* Strong experience managing **Agile** projects and capable of mentoring/coaching other PM's/Scrum Masters. Ability to oversee multiple projects. Independent, self-motivated manager. Track record of strong relationships with business stakeholders.
* **Business strategist;** plan and manage multimillion-dollar projectsaligning business goals with technology solutions to drive process improvements, competitive advantage and bottom-line gains. Managed budgets of up to $5M and cross-functional teams of up to 25 developers, programmers, analysts and network specialists.
* **Excellent communicator;** leverage technical, business and financial acumen to communicate effectively with client executives and their respective teams Tailors communication appropriately for the audience (stakeholders, development team) using whatever medium or channel necessary. Communicates business strategy to development team and gains consensus through various means necessary.
* **Expert in agile and waterfall project management methodologies / Agile Change Management Transformation.** Able to manage large project teams and known for high-quality deliverables that meet or exceed timeline and budgetary targets. Has successfully transitioned multiple Teams from Waterfall to Agile, with a focus on the Change Management process (minimizing risk).
* **Machine Leaning/Artificial Intelligence:** Managed Projects using big data and tools like AWS to implement artificial intelligence driven UX design catering to User Profile.

*Results:* Ensured Users were served up content that spoke directly to their needs and personality profile, helping to connect them more succinctly with the Product’s services.

**PROJECT MANAGEMENT ACHIEVEMENT HIGHLIGHTS**

* Led co-located teams across broad geo, cultural, technical, financial and business disciplines. Focused teams on Business Objectives, effectively tracking progress to ensure project milestones were completed on time, on budget and with the desired results.
* Mitigated risk factors through careful analysis of financial and statistical data. Anticipated and managed change effectively in rapidly evolving global business environments.
* Defined processes and tools best suited to each project. Moved between agile and waterfall approaches depending on project specifics and client goals, creating detailed project road maps, plans, schedules and work breakdown structures.

**MANAGENENT SKILLS SUMMARY**

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| --- | --- | --- | --- |
| **Project Management:**  Custom Software Development  Database Design (RDBMS)  Systems Engineering  System Migrations/Integrations  Enterprise-wide Service/Fulfillment/ERP/HR/Payroll Implementations  Infrastructure as a Service (IaaS)  Omni-Channel | **IT Project Lifecycle:**  Requirements Analysis  ROI Analysis  Costing & Budgeting  Project Planning/Scheduling  Testing/QA/Rollout/Support  Change Management  Risk Management  Business Process Improvement  Product Management | **Methodologies:**  PMBOK  Agile / Scrum  RUP (Waterfall)  ITIL  RAD/SDLC | **Value-Added Leadership:**  Cross-Functional Supervision  Team Building & Mentoring  Client Relations & Presentations  Business & IT Planning  Vendor Management  Communications Management  Resource Management  Program Management |

**CAREER SUMMARY BY INDUSTRY**

|  |  |  |  |
| --- | --- | --- | --- |
| **RETAIL**  Bare Minerals  Apple Inc.  Gymboree  Duracell  **LAW**  Orrick, Herrington & Sutcliffe  **PHARMA**  Pfizer  Medivation | **FINANCE**  Barclays  Bank of the West  Wells Fargo Bank  Charles Schwab  Alliance Capital  Goldman Sachs  AssetMark  **EDUCATION / RESEARCH**  UC Berkeley  University of CA (OP)  Lawrence Berkeley Natl Lab | **MEDIA / PUBLISHING**  The Gartner Group  SF Chronicle  UBM Electronics  **GOVERNMENT**  US Depart of Justice  CA State Controller’s Office  CA Dept of Water Resources  CA Dept of Health Services  US Dept of Transportation  EDD | **TECHNOLOGY**  Palo Alto Networks  University of San Francisco  TIVO  SUPPORT.com  Cisco  Facebook  Oculus  **INSURANCE**  Delta Dental Insurance |

**TYPES OF PROJECTS**

* **Infrastructure as a Service (Iaas):** For IaaS Consulting company, have managed the implementation of various Networking and Infrastructure implementation projects for companies throughout the SF Bay Area.

*Results:* Streamlined access to development resources, increased development productivity, reduced IT administrative burden, reduced provisioning times, quicker time to market for web-enhancements, lower IT administrative burden.

* **Software as a Service (Saas):** Have managed the implementation of Cloud-based implementations, migrations and upgrades of various applications for companies throughout the SF Bay Area.

*Results:* Streamlined access to system resources, increased development productivity, reduced IT administrative burden.

* **Business Process Modeling/Re-engineering:** Led re-engineering of business processes to improve communications between multiple departments and streamline efficiency for clients including Wells Fargo, Apple Inc, Delta Dental, University of CA (OP) and UC Berkeley.

*Results:* Created entirely new Dashboard driven User Based Roles / Notifications systems that allowed diverse areas of the business to work more effectively together in realizing a better Business Process (more cost and time effective).

* **Systems Engineering:** Led design and multinational rollout of robust, scalable and secure electronic data interchange (EDI), enterprise resource planning (ERP) and data-warehouse reporting systems for clients including Wells Fargo, Barclays Global Investors, Bare Minerals, Pfizer, Duracell.

*Results:* Completed projects up to two months ahead of schedule, as much as $1.2M under budget and to universal client acclaim.

* **Custom Software Developments:** Managed all phases of the software development lifecycle (SDLC) for dozens of custom solutions for clients including The Gartner Group, Goldman Sachs, Wells Fargo, Charles Schwab, Bare Minerals, UC Berkeley, University of CA (OP), Apple Inc, SF Chronicle, Duracell and UBM Electronics. **Omni-Channel**; Desktop, mobile and tablet experience.

*Results:* Custom solutions that fit the Business’ unique needs.

* **Database Developments:** Guided teams in the development of relational database management systems (RDBMS) and data warehouse systems, including Data Mapping, Transformation and Migration (ETL) for clients including Wells Fargo, Barclays Global Investors, Charles Schwab, UC Berkeley, SF Chronicle., UBM Tech, UCOP, Duracell, SF Chronicle and many others.

*Results:* Improved the reporting, consistency, recoverability and accessibility of data.

* **System Integrations/Migrations:** Project-managed large-scale initiatives involving the transition of programs to new platforms and the merger of disparate systems from acquired client companies for clients including Bare Minerals, Orrick, Herrington & Sutcliffe, Wells Fargo, Barclays Global Investors, Duracell and UC Berkeley.
* **Enterprise Implementations:** Directed global rollouts of new software and systems for clients including Bare Minerals, Apple Inc, Delta Dental, PG&E, UBM Electronics and Duracell. Systems included ERP, Order Fulfillment and HR/Payroll systems.

*Results:* Ensured defect-free releases through careful planning, testing and QA efforts.

**CAREER CHRONOLOGY**

**PRODUCT / PROJECT / PROGRAM MANAGEMENT (2008 – PRESENT)**

* **ServiceNow, Santa Clara CA (October 2020 - Present)** *Senior**Program/Project Manager*

Cross-Company Planning & Alignment: Facilitate process of gaining shared vision and developing work plans by partnering with stakeholders across business units and functional groups. Guide teams through structured and principled approaches to solving problems. Surface tradeoffs and make recommendations. Drive discussions with technical experts, understand the approach and decisions and then communicate it to stakeholders with clarity. Facilitate problem solving for technology risks/issues and drive mitigation, communication (up, down, and out) and resolution. Understand the long term technical strategy of the business unit and identify misalignment at the program level. Manage the program operating rhythm and milestones, ensuring that stakeholders are working towards common outcomes and clear timelines. Work with teams to craft content and frame ideas to generate the right level of discussion for different forums and audiences of different levels, including senior executives. Tracking & Accountability: Establish and maintain process and tooling to drive transparency / accountability and rigor in execution. Maintain key work plans and action items. Risks, Issues & Dependencies: Proactively identify and manage key risks, issues, and dependencies. Ensure that stakeholders who need to collaborate are connected. Escalate as needed to facilitate removal of roadblocks. Thought Partnership & Business Analysis: Collaborate with business leaders to help recommend solutions and corresponding action plans for the business problems their workstreams are solving. Provide quantitative and qualitative analytical support to support recommendations and identify new areas of opportunity.

* **Wells Fargo, San Francisco CA (April 2019 - October 2020)** *Senior**Program/Project Manager*

Strategy and Planning (Program Management) of Wholesale Banking Profitability and Relationship Pricing systems. Working closely with all Stakeholders (Executive level, Product Managers, Project Managers, Product Owners, Partners) developed workflow systems in the adoption of more agile practices and processes, developing training and JIRA Dashboards, Reports, Structures, Filters, Boards and Prioritizations tools to facilitate easeful assessment of pipeline, velocity, capacity and planning activities. Reporting to both upper Management and team members for the sake of streamlined communication across the board. Identified potential risks and issues in product management. **Agile/Waterfall** change management process bringing Team over from a hybrid of methodologies based on specific requirements of each Project and Vendor management/integration using JIRA, MS Project, Sharepoint, Teams and other tools to purer Agile Cadence. Mapping to overarching Wells Fargo regulatory requirements via process re-engineering of multiple matrixed and vertical teams working together.

* **AssetMark, Concord CA (Oct 2018 –Apr 2019)** *Senior**Product Manager*

As part of **PMO**, liaison between the Line of Business and Technology. Managed Stable Team (including Product Manager, Product Owner, Dev, QA) in Agile environment, guide daily Scrums, management of all Agile Events. Built the Product Roadmap based on MVP. Negotiated communications between various stakeholders, project contacts and implementation staff. Collaborated with technology managers and C-level execs through delivery. Release Management, including integration, quality assurance UAT Testing and Implementation Planning. Validate project financials, weekly burn-downs, status reports, Risk and Issue Management. **Agile/Waterfall** hybrid of methodologies based on specific requirements of each Project and Vendor management/integration using JIRA, MS Project, Sharepoint, Teams and other tools.

* **Wells Fargo, San Francisco CA (Nov 2016 –Oct 2018)** *Senior**Program/Project Manager*

As part of Wealth Management **PMO**, managed all communications between Business and Technology. Managed Project funding, budgeting, Business Case, MVP, BRD, Story Doc reviews and sign-off through to technology engagement. Drive communication for stakeholders, project contacts and implementation staff. Collaborate with technology managers through delivery. Release Management, including integration, quality assurance UAT Testing and Implementation Planning. Validate project financials, weekly burn-downs, status reports, Risk and Issue Management. 12 Projects managed successfully in total, spanning multiple lines of business. EPMO trained, and Projects fully transitioned to new Enterprise Project Management Organizational process. Identified potential risks in Product Management. **Agile/Waterfall** or hybrid of methodologies based on specific requirements of each Project JIRA, MS Project, Sharepoint and other tools.

* **Kovarus, SF Bay Area CA (Jun 2015 – Jun 2016)** *Senior**Program/Project Manager*

As part of **PMO**, liaison between client and internal delivery teams to safeguard the corporate relationships and maintain continuous positive customer experiences. Supervise end to end project execution while managing changing requirements, deadlines and issue resolution utilizing PMI methodologies. Identify resource needs and assign individual tasks/deliverables. Drive communication for stakeholders, project contacts and implementation staff. Collaborate with OR Manage engineering staff ensuring project deliverables are complete. Validate project financials ensuring overall budget is maintained, customer billing is accurate, and vendor invoices reconciled. 20+ Projects managed successfully in total, with Clients distributed throughout the SF Bay Area. **Agile/Waterfall** methodologies based on type of Projects.

* **Bare Escentuals, San Francisco CA (Apr 2014 – Nov 2014)** *Senior**Project Manager*

As part of **PMO**, managed a dozen Projects, managing full project lifecycle: schedule, client communications, risks, budget, tasks, resources and project documentation using cloud-based systems. Reported directly to head of PMO as Project Manager for 5 different Projects.  Projects included a **Sterling OMS implementation** for UK and France, a Global Mobile development Project **(Omni-Channel**), an Enterprise-wide Network migration, and a Tag management implementation. Oversaw reviews of all content development. Drove project execution (managed resources, tracked progress, identified and resolve issues). Documented and escalated risks. Generated and communicated project-level status reports to PMO Manager. Created and reviewed client account metrics and project reports, evaluated successes and identified areas for improvement. Supported Future State team on internal tools, ways of working and help improve efficiencies. **Agile** methodology.

* **University of California Berkeley, Berkeley CA (Nov 2013 – Apr 2014)** *Senior**Product Manager*

Product Manager of Visitor Center Services Product re-design. Provided feedback on product ideas. Described the requirements in details. Contributed new features to the product development. Approved or disapprove product features. Influenced decision making and timeline. Provided necessary resources for product development. Understood customer experience, developed vision (including MVP), prioritize processes and activities. Developed product pricing and positioning strategies. Negotiated with stakeholders. Arranged product demos, testing groups. Drove product launch. Participated in the promotion plan development. Built and maintained product awareness on all levels among product teams.

* **Apple Inc, Cupertino CA (Jul 2013 – Nov 2013)** *Senior**Product Manager*

Product Manager of Storefront Operation Business Process Re-engineering division at Apple. Provided feedback on product ideas. Described the requirements in details. Contributed new features to the product development. helped to define new business processes for handling expanded functional requirements in their SFO Workflow Application, including mobile platform development **(Omni-Channel)**. Developed wireframes, keynote presentations to present to key stakeholders and met to review and discuss requirements. Managed communications with co-located cross-functional Business Process Managers Approved or disapprove product features. Influenced decision making and timeline. Provided necessary resources for product development. Understood customer experience, developed vision (including MVP), prioritize processes and activities. Developed product pricing and positioning strategies. Negotiated with stakeholders. Arranged product demos, testing groups. Drove product launch. Participated in the promotion plan development. Built and maintained product awareness on all levels among product teams. **Agile** methodology.

* **UBM Tech, San Francisco CA (Jun 2011 – Jan 2013)** *Senior**Product Manager*

Product Manager of TechOnline Library (www.techonline.com) and re-launch of Embedded.com **(Omni-Channel**) using **Agile/Scrum** methodology. Provided feedback on product ideas. Described the requirements in details. Contributed new features to the product development. Approved or disapprove product features. Influenced decision making and timeline. Provided necessary resources for product development. Understood customer experience, developed vision (including MVP), prioritize processes and activities. Developed product pricing and positioning strategies. Negotiated with stakeholders. Arranged product demos, testing groups. Drove product launch. Participated in the promotion plan development. Built and maintained product awareness on all levels among product teams.

* **Bank of the West, San Francisco CA (Nov 2011 - Feb 2012)** *Senior**Project Manager*

As part of **PMO**, managed a project requiring the backwards re-engineering of business process descriptions based on code and the translation of this into Business friendly documentation. Produced visual data diagrams and workflows to illustrate ETL processes that were otherwise indecipherable to the Business. Project was mandated as part of conformance to Frank Dodd ACT.

* **University of California, Oakland CA (Sep 2010-Jun 2011)** *Senior**Product Manager*

Product Manager of web based (EIAOnline) version of decade old CITRIX based Endowment Investment & Accounting System via meetings with Users and developers in JAD sessions using **Agile/Waterfall** methodology. Provided feedback on product ideas. Described the requirements in details. Contributed new features to the product development. Approved or disapprove product features. Influenced decision making and timeline. Provided necessary resources for product development. Understood customer experience, developed vision (including MVP), prioritize processes and activities. Developed product pricing and positioning strategies. Negotiated with stakeholders. Arranged product demos, testing groups. Drove product launch. Participated in the promotion plan development. Built and maintained product awareness on all levels among product teams.

* **Plan Elements, Berkeley CA (Jan 2010-Sep 2010)** *Senior**Product Manager*

Managed full project lifecycle: schedule, client communications, risks, budget, tasks, resources and project documentation using cloud-based systems for Event Management Company. Managed workflow and content management of work products for Event Management Company. Oversaw project components: change management, business process, training and content development **Agile** methodology.

* **Barclay’s Global Investors, San Francisco CA (Jun 2008-Jan 2009)** *Senior**Product Manager*

As part of **PMO**, contributed to upgrade of iShares as a Senior BSA. Produced ETL documentation, data mapping and other data requirements documents. Coordinated meetings with Stakeholders and developers globally. Managed team in eliciting new Business Requirements for Product Knowledge Base (PKB), a new Intranet-based platform designed to allow Product Managers to view and compare via common interface all iShares (Barclays) ETP and ETF products to comparable competitor products. products. Coordinated meetings with Stakeholders and developers globally. **Agile** methodology.

**BUSINESS / SYSTEMS ANALYSIS 2000-2008**

**CLIENTS**

* Delta Dental, San Francisco, CA (Jan 2008-June 2008)
* Lawrence Berkeley National Laboratory, Berkeley CA (Feb 2007-Nov 2007)
* Wells Fargo, San Francisco CA (Jul 2005-Jan 2007)
* Charles Schwab, San Francisco CA (Jan 2005-Jun 2005)
* San Francisco Chronicle, San Francisco CA (Nov 2004-Feb 2005)
* Wells Fargo, San Francisco CA - (Oct 2002-Oct 2004)
* Orrick, Herrington & Sutcliff, San Francisco CA (Aug 2001-Sep 2002)
* Pfizer Pharmaceuticals, New York NY (Dec 2000-Jul 2001)
* Wells Fargo, San Francisco CA (Feb 2000-Dec 2000)
* Charles Schwab, San Francisco CA (Sep 1999-Jan 2000)

CORE COMPETENCIES

* Rational/UML methodology
* Business Process Re-engineering
* Gathered and documented Requirements in the form of Business Objective, BRD, Functional Requirements.
* Produced additional Project artifacts, as needed, such as Visio Diagrams, Wire-Frames, User Interface Designs, Object Diagrams, Business Process Models, Data Models, ETL, Data Migration documents, Use Cases, User Stories, Test Scripts, User Manuals. (Types of Artifacts produced depended on type of Project and requirements of Project Specific Milestones.)
* Partnered with Business Stakeholders, Management, and Developers in the seamless translation of Requirements, provide estimates of completion, target deliverable dates.
* Excellent written and verbal communication skills
* Analysis of Data and Code / Gap Analysis
* Drove milestones forward effectively, managing the timely production of all Project related deliverables and communicated this succinctly to all impacted stakeholders as needed.
* Interpersonal skills used for interacting with a wide breadth of personalities and cultures to elicit accurate Requirements sometimes in a very short amount of time given.
* Mentored and Trained more Junior Business Analysts.
* User Training

TECHNICAL DEVELOPMENT / SYSTEMS DESIGN / ARCHITECTURE (1994-1999)

CLIENTS

* Alliance Capital, Secaucus NJ (May 1999-Sep 1999)
* Duracell, Bethel CT (Apr 1998-May 1999)
* The Gartner Group, Greenwich CT (Jun 1997-Apr 1998)
* IBM, Southbury CT (Nov 1996-Jun 1997)
* The Gartner Group, Greenwich CT (Jan 1996-Oct 1996)
* Goldman Sachs, New York NY (Jun 1994-Dec 1995)

CORE COMPETENCIES

* Gathered Requirements from Users in the form of BRD and Functional Requirements as per Client/Server Software Development Life-cycle.
* Produced documentation for review and sign-off by Users.
* Systems Architecture, Database Architecture, Data-modeling, ETL, Data-Migration plans.
* Proof of Concept development in Visual Basic, C, C++, MS Access, MS Excel, Oracle, MS SQL, MySQL, PL/SQL, Crystal Reports, Business Objects, etc.
* Checked in and tested code into code management tools
* Met regularly with Project Manager, Business Stakeholders, other developers to discuss milestone status.
* Wrote/Performed Test scripts
* Reviewed User Feedback / tracked, updated, closed issues and bugs in Issues Tracking systems.
* User Training

**EDUCATION & CREDENTIALS**

* B.S., Professional Computer Studies Pace University, Pleasantville NY 1996– 1999
* Certificate, Computer Technology Development Columbia University, New York NY 1995 – 1996