



# XXYOUR NAMEXX, PMP

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## CAREER SYNOPSIS

### PROFILE

Senior level IT consultant with over 20 years of software consulting/design/development experience. Sophisticated record of contribution with FORTUNE-500 corporations in the design, implementation, quality assurance, and management of financial services applications and client-server systems. Advanced knowledge of data modeling, application frameworks/components, prototypes and graphical user-interface based systems deployed in a range of functions including leases, mortgages, pensions, securities, banking, and telecommunication billing applications. Expert in state-of-the-art project management and software development methodologies. Cross-functional management experience in all phases of the systems and software development life cycle. A proactive team player with strong planning, technical impact analysis, leadership, problem solving, and collaborative management skills.

### KEY AREAS OF EXPERTISE

- Project Management
- Software Development Life Cycle
- eCommerce & Wireless Data
- Quality Assurance
- Risk Management
- Integrated Business Solutions

### I.T. SKILLS

- ✓ **PROJECT MANAGEMENT:** With a span of control involving reviewing and providing input to proposals, designs, and multi-tiered architectures, responsible for numerous implementations in the telecommunications and financial services sector.
- ✓ **QUALITY ASSURANCE & TESTING TOOLS:** CMMI, WinRunner, TestDirector, SQA Suite
- ✓ **PLATFORMS:** Wireless, Web, Client Server, Mainframe.
- ✓ **APPLICATION DEVELOPMENT:** SQL, C, Visual Basic, SAS, COBOL, Easytrieve, Korn Shell
- ✓ **OPERATING SYSTEMS:** UNIX, NT, Win9x, VM/CMS.
- ✓ **SOURCE CONTROL TOOLS:** Endeavor, MKS Source Integrity
- ✓ **WEB DEVELOPMENT:** FrontPage, HTML, ASP, XML, BroadVision.
- ✓ **RELATIONAL DATABASES:** Oracle, Sybase, MS SQL, FOCUS, MS Access.
- ✓ **APPLICATIONS:** MS Office, Project, PowerPoint

## CAREER HISTORY

| Program Manager, XXXCOMPANY NAMEXXX (XXXSTART DATEXXX – XXXEND DATEXXX)   |                             |   |   |
|---|-----------------------------|---|---|
| <b>Description:</b><br>As the Program Manager for mobile initiatives representing Channels & Integration Group, I am responsible for the overall delivery for new mobile initiatives. These initiatives included: Mobile Banking, Mobile Payments and Contactless Payments Pilot. The collective goal of these mobile initiatives is to establish a brand new mobile channel for distribution for existing products and services by capitalizing on the ubiquitous mobile industry trends. Mobile Banking provides the ability to perform basic banking functions (account balance, funds transfer, and bill payment) by utilizing the mobile browser on any mobile device. Mobile Payments provides the ability to perform person-to-person (P2P) payments using SMS text messaging capability to anyone in the United States. Contactless Payments is a pilot project, to test specially equipped cell phones with NFC (near field communication) chips to make payments at select merchants. |                             |   |   |
| <b>Budget:</b><br>~\$4,200,000 (IT) +<br>~\$6,000,000 (Business)  | <b>Duration:</b><br>~1 year | <b>Team Size:</b><br>50+ (including core, support and stakeholders) | <b>Reporting Structure:</b><br>Matrix organization                        |
| <b>Methodology:</b><br>PMF Methodology (based on PMI)   |                             | <b>PM Tools:</b><br>MS Project, MS Office, Visio, MKS, PWS,         | <b>Technology:</b><br>Java, XML, Unix, Oracle, IVR, VXML, Network Gateway |
| <b>Working Relationship:</b><br>Executive stakeholders (VP & SVP), Project Managers, Procurement, Information Security, Solution Architects, Technology Integration, Card Operations, Finance, Fraud, AML, Branding, Legal and Marketing  |                             |   |   |
| <b>External Vendors:</b><br>IBM, Paybox AG, Impact Mobile, Moneris  |                             |   |   |

|   |                               |  |   |
|---|-------------------------------|--|---|
| <b>Deliverables:</b><br>All PM deliverables defined within the Large Project Management Framework, including: cost estimates, forecasting, budget tracking, project charter, risk management plan, project schedule, risk & issues log, project status reports and key project gating documents (Charter, Document of Understanding, Commitment to Deliver)   |                               |  |   |
| <b>Project Manager, xxxxxxxxxxxx (xxxxxxx – xxxxxxxx)</b>   |                               |  |   |
| <b>Description:</b><br><br>Overall PM representing Technology & Solutions Group, I am responsible for the overall deliverable for the Privacy Preference Project. The goal of this datawarehousing initiative is to bring the Personal & Commercial Client Group (PCCG) into legislative compliance of honoring customer preferences within 30 days of notice across all PCCG groups. Information is gathered from multiple sources (both internal and external) as per the source extract specifications which is standardized and consolidated utilizing Bank's pre-defined Extract, Transformation and Load (ETL) process. The resulting information is then stored in a Privacy datamart for clients to access to support their marketing campaigns and business processes needs  |                               |  |   |
| <b>Budget:</b><br>\$2,500,000   | <b>Duration:</b><br>~1 year   | <b>Team Size:</b><br>50+ (including core, support and stakeholders)                            | <b>Reporting Structure:</b><br>Matrix organization                                |
| <b>Methodology:</b><br>BMO PM Methodology (based on PMI)<br>CMMI  |                               | <b>PM Tools:</b><br>MS Project, MS Office, Visio, MPro, Matadors, MPort, IssueView, SharePoint | <b>Technology:</b><br>Datawarehousing, Trillium, Ab Initio, Unix, DB2, NDM, SFTP  |
| <b>Working Relationship:</b><br>Information Security, ETL Group, Data Architects, DBA, QA, Business Intelligence Consultants, Technology Architects, Internal & External source systems, Enterprise Infrastructure and Executives for progress reporting.   |                               |  |   |
| <b>External Vendors:</b><br>IBM Global Resourcing, Adastra  |                               |  |   |
| <b>Deliverables:</b><br>All PM deliverables defined within the BMO's CMMI framework, including: Project cost estimates, forecasting, budget tracking, project charter, risk management plan, project schedule, WBS, risk & issues log, project status reports   |                               |  |   |
| <b>Project Manager, xxxxxxxxxxxx (xxxxxxx – xxxxxxxx)</b>   |                               |  |   |
| <b>Description:</b><br><br>As the main PM representing Enterprise Technology Solutions Infrastructure (ETSI) Group, I am responsible for the infrastructure and operational components of the LASER Origination Program. Laser is a very large (\$125M+) undertaking at the Bank with the objective to develop and implement the business and technology infrastructure required to anticipate and fulfill TD Bank's customer's credit needs in a simple, consistent and comfortable way, through any channel any time. The Laser Origination Program consists of several projects: CreditLink Offers (CLO), Credit Bureau Solutions (CBS), Personal Lending (PL) and Real Estate Secured Lending (RESL). Overall responsibilities included the monitoring, tracking and day-to-day management of project to ensure timelines, budget and scope were adhered to, issues were being resolved, risks were managed in a timely manner, and issues requiring senior management attention were promptly escalated. In addition, provided lead role for recruiting of resources for PL via placement agencies and professional services providers |                               |  |   |
| <b>Budget:</b><br>\$25,000,000+ (CLO), \$2,500,000+ (CBS)<br>\$28,000,000+ (PL), \$30,000,000+ (RESL)   | <b>Duration:</b><br>~2+ years | <b>Team Size:</b><br>100+ (including core, support and stakeholders)                           | <b>Reporting Structure:</b><br>Matrix organization                                |
| <b>Methodology:</b><br>TD PM Methodology (based on PMI)   |                               | <b>PM Tools:</b><br>MS Project, MS Office, Visio, ProSight, EPM                                | <b>Technology:</b><br>Mainframe, Unix, Java, WAS, MQ Series, VPN, IMS, DB2, Cobol |
| <b>Working Relationship:</b><br>PMO Office, Development Group, Business Support Service Group, eBusiness Support Service Group, Client Services, Technology Risk Management and Information Security, Service Management, Architecture & Engineering, QA, Business Groups, and Executives for progress reporting.   |                               |  |   |
| <b>External Vendors:</b><br>IBM, CGI, Fair Issac, Telus, Deloitte, M Systems, and InfoSys   |                               |  |   |
| <b>Deliverables:</b><br>Project cost estimates, input into the overall Project Charter and Project Definition Document (PDD), WBS, project schedule, risk & issues log, project status reports, production acceptance test plan, performance test plan, software development plan   |                               |  |   |
| <b>Project Manager, xxxxxxxxxxxx (xxxxxxx – xxxxxxxx)</b>   |                               |  |   |
| <b>Description:</b><br><br>Responsible for the overall project management of "Back to Basics – Basis100 Replacement" project. The Consumer Credit Adjudication Processing System (CCAPS) application supports five distinct trading partners that are critical to consumer loan, mortgage acquisition, sales and fulfillment process via Basis100 Gateway. This project established direct connectivity from BMO to five trading partners by replacing the Basis100 Gateway. This project included both application enhancements and infrastructure changes to enable connectivity with the trading partners. Overall responsibilities included the monitoring, tracking and day-to-day management of project to ensure timelines, budget and scope were adhered to, issues were being resolved and risks were managed in a timely manner.  |                               |  |   |
| <b>Budget:</b><br>\$1,070,000   | <b>Duration:</b><br>7 months  | <b>Team Size:</b><br>15 core, 8 stakeholders, 15+ support staff                                | <b>Reporting Structure:</b><br>Matrix organization                                |

|   |  |  |
|---|--|--|
| <b>Methodology:</b><br>BMO PM Methodology (based on PMI)  | <b>PM Tools:</b><br>MS Project, MS Office, Visio, MPRO, MPort, Matador | <b>Technology:</b><br>Mainframe, MQ Series, TLS, VPN |
| <b>Working Relationship:</b><br>PMO Office, Development Group, Information Security, Service Management, Network and Systems Group, Financing Products Group, Credit Operations, QA, Application Management Partners (AMPS) Group, and Executives for progress reporting. |  |  |
| <b>External Vendors:</b><br>GE Mortgage Insurance Canada, Dealer Access, BCE Emergis, Filogix Inc., Xceed Mortgage Corporation, Canada Mortgage & Housing Corporation (CMHC), Canadian Securities Registration Services (CSRS), Q9 Networks                               |  |  |
| <b>Deliverables:</b><br>Project management plan (PMP), WBS, project schedule, risk & issues log, project status reports, firewall rules, network diagrams, implementation plan  |  |  |

| System Integration Testing Manager, xxxxxxxxxxxx (xxxxxxxxx – xxxxxxxxxxxx)   |  |                           |  |
|---|--|---------------------------|--|
| <b>Description:</b><br>Managed a cross-border team of programmers and test analysts situated in 1 Canadian and 3 U.S. cities in the implementation of a Global Pension Record Keeping system. |  |                           |  |
| <b>Budget:</b><br>\$1,250,000   | <b>Duration:</b><br>10 months                    | <b>Team Size:</b><br>3-10 | <b>Reporting Structure:</b><br>Matrix organization |
| <b>Methodology:</b><br>Summit Methodology   | <b>PM Tools:</b><br>MS Project, MS Office, Visio |                           | <b>Technology:</b><br>Client/server                |
| <b>Working Relationship:</b><br>Senior Executives, Developers, Business Analysts Group  |  |                           |  |
| <b>External Vendors:</b><br>None  |  |                           |  |
| <b>Deliverables:</b><br>Successful integration testing and deployment of GPRS system.   |  |                           |  |

**Business Systems Analyst**, National Canada Bank (March/1991 – August/1992)

**Technical Systems Analyst**, CGI (March/1988 – March/1989)

**Programmer/Analyst**, Canada Bank (June 1987 – March 1988)

**Programmer/Analyst**, Bank of Canada (May 1984 – June 1985)

### EDUCATION/PROFESSIONAL UPGRADING

| Education/Course   | Institution/Organization     | Date      |
|--|------------------------------|-----------|
| Bachelor of Science Degree (BSc.) – Computer Science & Mathematics | Waterloo University          | 1980-1985 |
| Certificate of Achievement – Enhanced Negotiation Skill Workshop   | University of Toronto        | 2001      |
| PMP Certification – Project Management                             | Project Management Institute | 2000      |
| Certificate of Achievement – Risk Management                       | George Washington University | 1999      |

**Exceptional References Available Upon Request.**