



Skills

- Lean Six Sigma Master Black Belt in Process Excellence/Business Transformation
- Proficiency in strategy, program/project mgmt., process engineering, change mgmt., and sales
- Excellent relationship management, communication, negotiation and presentation skills
- Proven ability to multi-task in a fast-paced and nimble environment

Work Experience

(IN)Strategy – Management Consulting

Orlando, FL

Managing Executive of Corporate Strategy and Program & Project Mgmt. Servicing 2014 - Present

- Leading organizations in the development of strategy, enterprise project mgmt. offices, scaling SaaS prods/sales and process engineering; while delivering on project mgmt. methodologies ie; Agile, Scrum & Waterfall.
- Effective program management of the various vertical groups, including portfolio project mgmt and strategic initiatives; including facilitation of executive prioritized initiatives, redefining processes for effective delivery, ROI benefits, liquidity risk mgmt. and utilizing enterprise project tracking tools ie; Jira, Trello & Basecamp.
- Providing support to Venture Capitals, FinTech, Financial Services, Energy, Government, Utilities, Media & Communications, Entertainment & Resorts, and Startups from program management to implementation cycles.

Tessera Venture Partners

New York, NY

Board Advisor

2018 - Present

- Building the next frontier of blockchain and AI companies in Cryptocurrency, Digital Currency, FinTech, Trading Platforms, Cybersecurity, Payment Modernization, HealthTech and Digital Media.
- Effective and strategic management advise for the portfolio companies on finance, credit management, treasury regulations, technology and digital strategy with a focus on business and industry transformation.

Canadian Imperial Bank of Commerce

Orlando, FL

Vice President of Project Management Office & Corporate Strategy

2015 - 2018

- Effective management of the Retail & Business Banking project portfolio and the strategic initiatives; including facilitation of quality executive project selection, ongoing monitoring and reporting and defining processes for effective and efficient initiative delivery and business benefits.
- Leading the enterprise project management methodology in implementing 600 projects/initiatives with several PM professionals; while implementing an Enterprise Project & Portfolio Management tool ie; Agile & Waterfall.

BMO Financial Group

Toronto, Ontario

Sr. Director, Corp. Strategy and Prog & Project Mgmt. Office – Enterprise eChannel 2010 - 2014

- Provided governance of a \$110MM M&A budget for the eChannel & Corp Mktng N.A groups in the Exec Initiative Comm (EIC), in optimizing eCommerce & tech investments, w/in all digital & call ctr platforms.
- Led the Enterprise Balanced Digital Scorecard program for the bank through: development of digital KPI's, revenue metrics, resource mgmt, process optimization, and a multi-faceted customer experience strategy.
- Designed the Canadian Anti-Spam Legislation Strategy and developed an enterprise Preference Center, accomplished the following: client-focused solution, technology strategy, and risk management.

Director, Program & Financial Mgmt – Enterprise eChannel

2008 - 2010

- Design/Delivered the integrated digital strategy for a new Corp ebusiness group, Digital Pymts business, and Corporate Marketing, which included: an organizational structure, digital & call ctr channel strategy, technology plan, process transformation, an insight/analytics platform, cust/client dashboard, & established KPI's.
- Developed and launched a multi-generational Enterprise Digital Marketing Strategy with \$6.8MM in revenue generation (Yr1) for the Public and Secure/Transactional sites, U.S. & CAN.
- Implemented a newly redesigned website with \$10MM in cost savings through the following: program management, channel sales optimization, analytical metrics, UX & testing, and process excellence.

Sr. Manager, Corporate Strategy – Office of Strategic Management

2007 - 2008

- Led and supported medium-large key strategic and tactical initiatives identified by the Executive Initiative Committee as high priority (e.g.; Development of a new eCommerce Group, Board Strategy Day, etc), led strategic initiatives to diagnose opportunities, designed programs, and delivered solutions to business groups.
- Assisted in the execution and change management of a new enterprise investment prioritization strategy, which monitored KPI's, managed bank risk, and tracked benefits/spend w/in an earned value management format.
- Measuring, monitoring and reporting the outcome of medium-large initiatives on an ongoing basis, post-implementation, risk management, vendor management, customer experience & add'l support to the enterprise.

NBC Universal – Theme Parks and Resorts

Orlando, Florida

Sr. Financial Analyst, Program Mgmt & Corporate Strategy

2006 - 2007

- Assisted in a revenue-focused project named the Universal Express Pass product to increase it by 25% in revenue by executing a new pricing strategy; partnered with Consumer Insights & Park Operations Teams.
- Executed a multi-generational strategy and saved \$1.7MM in a Labor Optimization Project, which the scope integrated: Universal Park & Resort Operations, and reported to the CFO.
- Presented to the Executive Leadership Team for approval on programs with respect to new attractions, closure of attractions, new streams of revenue channels, guest experience, ad hoc & joint venture projects.

JPMorgan Chase

Melbourne, Florida

Operational Excellence Mgr, Process Strategy & Enterprise Prog Mgmt Office

2004 - 2006

- Generated \$8MM in revenue through Champion-Challenger strategy and utilized the following skills: portfolio management, negotiated joint ventures, built financial models, delivered a loss mitigation strategy, analyzed risk & real options and designed executive dashboards, in a call center environment.
- Developed and executed cross-departmental programs – Process Change Mgmt, E2E Core Process Improvement Program, implementation of a Credit Card Div, and an Online Employee Suggestion Prog.
- Saved \$2.5MM in Operational Excellence through the DMAIC & Agile processes, which included the following: Voice of the Customer, strategic analysis, value stream map, cause & effect matrix, stakeholder analysis, forecasting (moving average), financial modeling and statistical process controls.
- Developed & mentored associates in Operational Excellence (Six Sigma), iGrafx and other proprietary programs.

Central Florida Lighting

Orlando, Florida

Director of Marketing & Operations, Corporate Strategy

2001 – 2003

- #4 Lighting Company within Florida in sales through the development and implementation of a two-prong strategy consisted of expanding the customer base and product line, driving strategic profitability.
- Business Development included – portfolio (penetration, share of wallet) analysis, sales/pricing strategy, process improvements and vendor management, with contract negotiations.
- Commercial projects included – created RFP, lighting industry analysis, feasibility & competitive analysis, contractual agreements and project management.

Orlando Utilities Commission

Orlando, Florida

Sr. Business Analyst, Program Mgmt & Customer Experience

1999 - 2001

- Increased sales by 7% through the implementation of a pricing strategy via marketing, financial modeling, development of metrics/KPIs and service-level agreements.
- Cost-savings of \$89K of a transportation strategy with the development and maintenance of tools using Microsoft and proprietary applications.
- Created programs - Low-Income Housing Rate and Energy Efficient Air-Conditioning - based on the Voice of the Customer, industry analysis and branding/marketing strategies.

Education

Rollins College, Winter Park, Florida

2003 - 2004

- *Crummer Graduate School of Business – Master of Business Administration*
 - Concentrations: Finance & Operations

University of Central Florida, Orlando, Florida

1998 - 2002

- *College of Business Administration – Bachelor of Science*
 - Concentrations: Management of Information Systems

Lean Methods Group, Florida

2003 - 2006

- *Breakthrough Management Group*
 - Certification: Six Sigma Green Belt & Black Belt