

**Kevin Aguanno, B.A., PMP, IPMA-B, MAPM**  
IBM Certified Executive Project Manager  
Agile Centre of Competency Lead  
Accelerated Solution Delivery (ASD) Competency Lead, Canada  
Solution Manager, Portals/eForms/Web Content Management Practice

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## Profile

A driven, result-oriented Executive Project Manager with extensive experience working with a wide range of industries. Currently the Agile Centre of Competency Lead for IBM Canada and a Solution Manager for its Portals/eForms/Web Content Management practice. Past Executive Producer of IBM Canada's Interactive Media Studio, and Principal Consultant of IBM Canada's Media & Entertainment Industry unit. Winner of several international awards. A proven manager and public speaker active in research and writing on the topics of project management, agile software development methods, and team motivation.

Mr. Aguanno specializes in managing complex application development and systems integration projects. He has been brought in as a trouble shooter to turn around many troubled projects, and is known in the industry for this expertise. Mr. Aguanno has spoken at conferences and has published articles on the aspects of managing complex projects. He has written several books on topics ranging from agile management and team motivation through to offshore banking in tax havens. Many of his seminars are available as Audio CDs, DVDs, or online downloads released by several publishers. Mr. Aguanno is the editor of the Project Management Essentials Library series of books and the Project Management Audio Library series of audiobooks published by Multi-Media Publications Inc. He is the past editor of the Element-K journal *Inside Project Management*.

Active in the project management community, Mr. Aguanno is an active member of the Project Management Institute (USA) where he holds the Project Management Professional (PMP) designation, the Association for Project Management (UK), the American Society for the Advancement of Project Management (ASAPM) where he is one of four competency assessors, and the Project Management Association of Canada (PMAC-AMPC) where he is a founding director, the current Vice President, and one of two lead PM competency assessors. With a Level-B competency accreditation by the International Project Management Association (IPMA) and IBM's own competency certification as an Executive Project Manager, Mr. Aguanno is experienced with many project management methods including IBM's Worldwide Project Management Method, Rational Unified Process, Scrum (he is a Senior ScrumMaster), and PRINCE2, among others.

## Employment History

<u>Starting</u>	<u>Ending</u>	<u>Description</u>
Jan. 2008	Present	<i>Solution Manager, Portal WCM and eForms Practice, Application Innovation Services, IBM Canada Ltd.</i>

**Sales:** duties include account sales strategy planning, directing the IBM teams responsible for preparing bids, customer executive presentations, and contract negotiations.

**Delivery:** duties include full accountability for successful project delivery including achieving financial results and customer satisfaction targets, project portfolio management, acquiring and providing business direction to project managers and senior team members leading delivery engagements, building and managing relationships with 3<sup>rd</sup> party subcontractors including negotiating subcontracts, building and maintaining customer executive relationships, helping customers with strategy development, and acting as the customer escalation contact point for in-flight projects in the portfolio.

May 2007 Present

*Agile Centre of Competency Lead, Application Innovation Services, IBM Canada Ltd.*

Duties include promoting agile project management and agile development methods within IBM and to external customers, providing agile training and mentoring to external clients, developing and sharing agile-related intellectual capital, promoting IBM's expertise in the agile space at customer events and external conferences, helping to close deals with agile-related content, providing resourcing advice on agile projects, and acting as the "go-to" person for agile-related inquiries within IBM Canada.

- ◆ **Consultant** for a major Canadian insurance company assisting it with its transition to using Scrum as an agile management method. Worked with team members to help them adjust their daily practices, provided training on advanced agile techniques, assessed project health, prepared structural and process recommendations for CIO and VP IT. Customer extremely pleased with the results, implementing nearly all recommendations in the report, signing up Mr. Aguanno for additional work guiding them through the implementation of the recommendations. Follow-up assessments and reports met with similar very positive responses.
- ◆ **Consultant** helping a team take over the application maintenance outsourcing responsibilities from another vendor on behalf of a company developing software for the financial services industry. Worked with the customer and the IBM outsourcing team to align the customer's Version One tools and Scrum-based processes to the IBM iterative enhancement methodologies used within the IBM application outsourcing practices. Aligning the two sets of processes led to the successful completion of a multi-year, multi-million dollar outsourcing agreement.
- ◆ Worked with representatives from across IBM's various divisions over several months to develop a consistent, consolidated way of describing IBM's approach to agile development and agile management.
- ◆ **Consultant** responsible for reviewing and providing guidance on the creation of a whitepaper published by IBM's Project Management Centre of Excellence describing how agile project management methods fit within IBM's project governance framework. This whitepaper was distributed to IBM project managers worldwide.
- ◆ **Consultant** helping one division of a large Canadian bank adopt agile techniques into their existing project governance structures. Provided guidance and training on agile concepts, and suggested revisions to the existing processes that would improve the performance of high-change projects. Very positive customer satisfaction.

- ◆ **Consultant** to a major U.S. bank and its IT services vendor for the adoption of Scrum as a project management methodology for a large package implementation and integration project. Project spanned 2 years with a team in excess of 100 persons.
- ◆ **Trainer** for a six-class series on agile development methods for the interactive media division of a major broadcaster. Sessions included hands-on exercises and in-depth discussions on requirements management, estimating and planning, change management and negotiating with stakeholders, metrics, reporting, and agile testing. Delivered on time, on budget, with a high level of customer satisfaction. Customer has offered to be a reference for future agile training engagements.
- ◆ **Consultant** helping the IBM India team work with their Swedish outsourcing customer to establish a Scrum management paradigm for their future outsourcing work. Swedish customer was pleased with the improved communications, increased control, and lower overall project risk.

Nov. 2006    July 2007    *Construction Project Manager*

**Project Manager** for a residential housing development project. Responsibilities included coordinating design (elevations, floor plans, engineering, site plans, septic design), permitting and approvals (engineering, health dept., environment/conservation authority, building dept.), construction financing, contractor sourcing and bid management, contracting, supplier management, contractor management, financial management, legal actions against non-performing contractors, and final inspections and turnover. Project delivered on time, within 3% of budget forecasts, and with very high quality.

Mar. 2006    Present    *Certified Executive Project Manager, Application Innovation Services, IBM Canada Ltd.*

- ◆ **Project Manager** coordinating the development of a digital video security managed operations offering for the IBM Security Services practice. Includes the details around the offering (including risk assessments, pricing, and marketing materials), an offering marketing strategy, and demonstration instances in IBM Canada's Security Operations Centre.
- ◆ **Project Manager** for the development of a web-based application that allows the maintenance of on-call schedules and pager numbers for system administrators in a secure environment with full logging and audit trails. The system interfaces with the notification system used to page out when problem tickets have been opened by a help desk. Developed in Java using the struts framework.
- ◆ **Project Manager** for the negotiation and preparation of a complex statement of work and legal agreement, where an earlier vendor had failed to successfully negotiate an agreement with the customer. Led the team to a signed \$3.2M contract while improving relations and building trust with the customer.
- ◆ **Project Executive** of a large document management project for a government body. The project spanned five business units and included document scanning, OCR (Kofax), approval workflow (through IBM DB2 Content Manager), integration with SAP, integration with Novell

GroupWise, integration to Microsoft Office and AutoCAD (IBM Document Manager) and full records management (retention classification, etc.) capability (DB2 Records Manager). The project changed how the government departments conducted their affairs, requiring significant business process changes and employee training. Led the project for a one year period before transitioning the project to another project manager for completion. Project is still currently underway.

- ◆ **Project Executive** of cross-organizational team designing a solution for a major condominium developer to provide automated energy management for the building environmental systems to respond to government energy cutback challenges. In addition, an innovative twist was added with a touch-screen interface added within condominium units allowing owners to programme the temperatures in their units, have their own units' environmental control systems participate in the government cutback programme (thus earning government rebates), view various security camera feeds within the building, control their in-suite alarm system, and control automated blinds and other devices. Built the business case framework, led consulting activities, co-developed the sales strategy (including focus groups, etc.), helped secure funding from a global innovation fund, and led executive level presentations. Project currently still underway.
- ◆ **Project Manager** of an intranet portal strategy engagement for a large financial institution. Prepared presentations and facilitated workshops with C-level executives. Led sales strategy sessions for the follow-on implementation phase. Project currently underway.
- ◆ **Project Manager** of a consulting project performing a detailed fit/gap analysis of various portal products to an insurance company's specific requirements. Delivered on budget and ahead of schedule.
- ◆ **Project Manager** of a project performing a health check on an existing portal implementation for a financial institution. Output of the project was a list of findings and recommendations to improve performance and correct some technical issues plus a roadmap for upgrading the portal software to support both an intranet and extranet on the same infrastructure. Delivered on time and under budget.
- ◆ **Project Manager** for a strategic proof of technology project for an insurance company assessing the productivity gains from two different web software development tools: WebSphere Portlet Factory and Lotus Forms. Negotiated, planned, and managed the engagement, including presenting the final report. All customer expectations exceeded, overwhelming success.
- ◆ **Project Manager** for a project to install and configure a Lotus Forms-based solution for a major Canadian bank. Project included integrating into several legacy systems for branch officer profile and customer information, plus storage of completed forms into IBM DB2 Content Manager. Forms presented through integration with WebSphere Portal Server. One key component was the custom development of a forms publishing administration tool that was harvested for reuse on future projects. Coordinated a separate project for conversion of legacy forms to the new platform.
- ◆ **Project Manager** for an initiative for a Canadian insurance company to

install Lotus Forms software, conduct a usability assessment and design heuristics review of the proposed GUI, and provide advanced development support to the insurer's IT staff who will be engaging in ongoing forms development work.

Feb. 2002    Feb. 2006

*Certified Senior Project Manager, e-business Integration (currently called Application Innovation Services), IBM Canada Ltd.*

- ◆ **Project Executive** coordinating a response team for an Ontario government RFI for the “ePhysician Portal” initiative, a large and complex venture. The response team crossed several lines of business within IBM and LGS and included a key contingent from one of the top five consulting firms (under a teaming agreement), totaling over forty-five people. RFI was delivered on time and within the assigned response budget.
- ◆ **Co-Project Manager** brought in part-way through a troubled multi-million dollar Siebel project for a major financial institution. **Assisted in the recovery of this troubled project**, including managing a team of software developers, plus Functional Testing and User Acceptance Testing design and execution activities. Project delivered on time, on budget and with a delighted customer. Rollout of the resulting solution was a tremendous success.
- ◆ **Project Executive for recovering a large (\$9+ Million) troubled software development and integration project.** Solution provided a web portal-like interface to provide automated server and software provisioning services. **Developed application development and testing strategies, implemented agile development techniques** into an existing SEI CMM certified process, and **coordinated the efforts of 14 project managers**, managing over 200 project personnel in 17 locations across Canada, the U.S. and India. The different participating teams came from different organizations, including third party contractors, and all had to work towards a common method of conducting and managing their work. This high-risk, high-visibility project produced 23 patent filings for a revolutionary system with over 1 million lines of custom code (more than half hand-generated) to customize and integrate products never before brought together in a single solution. Through the agile strategies deployed, and leading the project team to a tremendous performance, the team completed Phase 1 on time and under budget, and Phase 2 within approved budget and schedule tolerances. Over all, across both phases, the product was delivered in one third of the originally-estimated time and budget.
- ◆ **Managed the recovery of a troubled portal strategy consulting project.** Worked with the team to define remaining scope, negotiated a deliverable acceptance process with the customer, resolved outstanding issues, and brought the project to closure. **Performed a root cause analysis and published a detailed lessons learned report** at the end. Turned around a dissatisfied customer into a satisfied customer willing to provide a positive reference.
- ◆ **Managed IBM's portion of a consortium bid** on a multi-year, multi-million dollar applications rewrite project for a federal government agency. **Delivered** a complex, quality response in record time with a geographically-dispersed team. Other consortium partners included fierce

IBM competitors. **Managed the daily relationship** with these competitors and negotiated the division of revenues and work within the final bid.

- ◆ **Managed a complex RFP response for a multi-million dollar systems integration project for the broadcast industry.** Solution included training, integration services, business process redesign, change management services, and extensive quality assurance testing. **Co-developed the proposal strategy** and oral presentation strategy. **Managed the creation and quality reviews** of the proposal and associated oral presentation materials. The proposal was successful in winning the business. The customer cited the high-quality proposal and the creativity and approach of the oral presentation as deciding factors in awarding the business to IBM.
- ◆ **Managed the recovery of a troubled email systems upgrade project.** Working with a technical deployment team, **reestablished trust and credibility** with the project sponsor and governance boards. **Prepared new project delivery strategy**, estimates, and project plans. **Sold the new approach** to the team and governance boards. **Managed the project through the transition** to the new approach until the technical and operational processes were debugged and the client upgrades were running smoothly and on schedule. Managed transition to a junior project manager who would run the ongoing user upgrade process. Very satisfied customer.
- ◆ **Project Manager – Tivoli Monitoring Deployment for a major Bank.** Managed the planning and deployment of Tivoli monitoring tools to over 200 UNIX and NT servers for a major Canadian bank. The project included the deployment of software distribution to servers and a few thousand workstations. Directed a team of technical experts in the development of interfaces to ticketing and notification tools. Client SVP said that the transition was “the smoothest [he has] ever seen.” Under budget and on schedule. Delighted customer.
- ◆ **Managed** the redevelopment of a PERL-based prototype of a product that automated Tivoli systems administration functions through a web portal interface. The tool was redesigned and developed as a J2EE application in record time, using agile development methods. The resulting project received very high customer satisfaction ratings, as it was on time and on budget, with almost perfect code quality.

Phase Two of this project doubled the functionality of the product and brought it up to production-quality standards. The resulting product is expected to be used as the basis for a new service offering, and may also be sold as a packaged software product. Phase Two was delivered on schedule and on budget with a high level of sponsor satisfaction.

**Project Manager** for the development of Phase III of the Tivoli systems administrator portal solution under very tight timelines and budgetary constraints. Completed weeks ahead of schedule and slightly under budget. Project was noted for high customer satisfaction and overall code quality.

- ◆ **Acting Project Executive** for a complex cross-line of business solution for a company in the facilities management business. The solution was to develop a web-based self-service portal for the company’s customers and employees that would allow roles-based and user-based access to a back end ERP system, email, web conferencing, instant messaging, a document

management system, and a project teamroom-type solution. The project included all of the custom development and integration work, as well as the buildout and outsourcing of a new infrastructure for this solution. The project was delivered approximately 20% under budget and on time. The customer was delighted, as the budget and timeline performance accelerated the attainment of business case benefits, shortening the breakeven period and improving the overall ROI. Was awarded by IBM for my leadership in this initiative.

- ◆ **Project Manager** for a portal strategy consulting project for a major retailer. The project evaluated four different business models, selected a recommended model, and then documented the operational models for customer order management, inventory replenishment, fulfillment, and marketing/promotions, among others. The deliverables included a portal development roadmap including estimates and a business case for the first phases. Project delivered on time and within the approved budget tolerances.
- ◆ **Project Management Consultant** evaluating a troubled government web portal project. Performed interviews and other data gathering, completed a full root cause analysis, and wrote a detailed executive report with many recommendations. Final report was presented to senior management teams and many of the recommendations were accepted and triggered process improvement activities.
- ◆ **Project Implementation Planning Consultant** for a major healthcare web portal project for a major regional hospital group. Led planning team to develop approach, and prepare estimates. Personally constructed a business case framework for the solution that helped the hospital group determine the best course of action moving forwards.
- ◆ **Project Management Consultant** performing an independent review of a troubled content management systems project for a U.S.-based bank. Reviewed issues, current results, and current plans, while preparing a long list of recommendations for future improvements. Mentored the project management team through the resulting replanning and restructuring activities.
- ◆ **Offerings Development Manager** for the Digital Media EBO business unit within IBM that required project management leadership to help the offerings development team achieve their business goals. Led the development of target market analysis, offerings identification, offerings development, offerings sales strategies, and preparation of formal pricing, risk assessment and QA reviews to usher the new offerings (and the offerings teams) through the formal IBM processes. Offerings developed included several focused on enterprise video communications (video conferencing and collaboration) and two in the digital security arena. Exceeded productivity targets and met very aggressive timelines.

Apr. 2003    Dec. 2003

*Editor, Inside Project Management*

While working as a full-time project manager for IBM, Kevin is also the editor of *Inside Project Management*, a professional journal published by Element-K Journals, located in Rochester, New York, USA. Duties include:

- Developing issue plans and an editorial calendar for the monthly

journal (establishing editorial direction);

- Building the pool of contributors;
- Assigning articles to authors;
- Writing project management tips sent out via broadcast email to listserv subscribers;
- Editing submitted articles for structure, completeness, originality, style, content, clarity, accuracy, and grammar;
- Ushering each issue through multiple rounds of reviews by copy editors including article reviews and graphic layout reviews; and
- Issuing cheque requisitions for contributing authors.

Apr. 2002    Sept. 2003

*Canadian Project Management Knowledge Network (PMKN)  
Leader, IBM Global Services*

In addition to his role as Certified Senior Project Manager, Mr. Aguanno was also responsible for this PMKN deployment leader role wherein he:

- ◆ **Maintained distribution lists** of the project managers and PM Champions in IBM Global Services, Canada;
- ◆ **Disseminated schedules** of upcoming PMKN-sponsored educational PM workshops and teleconferences;
- ◆ **Solicited speakers** for the workshops and teleconferences;
- ◆ **Promoted and organized** workshop and teleconference events;
- ◆ **Promoted harvesting, sharing, and reuse** of project management-related intellectual capital;
- ◆ **Captured statistics on the value generated** from project management intellectual capital reuse; and
- ◆ **Disseminates other information** about Project Management Knowledge Network initiatives and intellectual capital content.

Mar. 2001    Jan. 2002

*Principal, Business Innovation Services, IBM Canada Ltd.*

- ◆ **Negotiated** eighteen agreements with customers in the Utility and Media industries. **Managed the resulting project portfolio** through to successful conclusion. **Supervised individual project managers**, coordinated cross-project intra-company initiatives, and managed resources in projects spanning several companies. Focus on financial and risk management.
- ◆ **Managed a key strategic project** for a large television network. With U.S.-based and independent consultants, interviewed 50+ people (nearly all VP and Director-level staff plus a number of other senior managers) to capture strategic direction and key areas of opportunity for the acquisition

of a new ad sales and traffic system. Team developed a high-level functional model, a detailed description and prioritization for hundreds of unique requirements, an extensive RFP, a short list of target vendors with detailed vendor briefs, a vendor evaluation tool, and a business case framework incorporating metrics supporting each business area of opportunity. The project was delivered on time and on budget, with a high level of customer satisfaction.

Jan. 2000    Mar. 2001    *Principal, e-business Consulting and Services, IBM Canada Ltd.*

- ◆ **Managed the design and development** of a bilingual conference web site for a federal government body. The web site included online registration and post-conference updates with speaker presentations available to the public. The web site was launched on time and on budget.
- ◆ **Managed the redesign** of a web site for a startup company offering access to Initial Public Offerings (IPOs) to individual investors over the Internet. With the direct involvement of the company's advertising agency and the IBM Interactive Media creative team, the creative redesign process went through several iterations to narrow in on portraying the right brand image on the Internet. This project highlighted the knowledge gap some advertising agencies have when talking about the technical limitations of Web browsers, HTML, and the Internet, especially when choosing colours and creating practical designs. The project was delivered 13% under budget.
- ◆ **Managed a consulting team** which worked closely with a company to design an Internet Web portal site which would act as a central repository of information within the company's industry. The portal site would facilitate eCommerce transactions, include automated industry-specific data feeds, and have easy-to-use maintenance tools.
- ◆ **Spearheaded a consulting team** which helped a customer prioritize their business requirements and potential returns on various business-to-business web initiatives, and produce a resulting solution design. **Presented** the final solution to the customer's trading partners in a four-hour-long session which secured funding from most of the partners for the initiative and received universal acceptance.
- ◆ **Spearheaded a consulting team** for an Internet broadcast video solution for a dot.com startup company run by a venture capital firm. The solution would include a web portal providing access to entertainment (video, audio) content and collaborative elements clustered around ethnic communities. The team produced a technical and creative solution design in support of the firm's business and financing strategies.
- ◆ **Project Executive** for a large intranet development and systems integration project incorporating portal and personalization tools into the overall solution. The intranet was developed for a professional sports players' association to help them better communicate pension benefits, negotiations status, and other information directly to players and their families. A customized email gateway allowed players to communicate with fans on an invitation-only basis to help prevent them from being overwhelmed with email.
- ◆ **Managed a web site redesign** project for a large I/T company which

reinforced its brand image and offerings strategy. The project was delivered on time and on budget through a very aggressive schedule.

- ◆ **Managed a consulting team** which helped a publishing-industry customer develop an Internet strategy, goals, and a prioritized set of initiatives including a new web portal-based delivery model. The initiatives and supporting market research helped the customer build a business case for additional funding to implement the selected initiatives. Delivered on time, under budget, and with a very high level of customer satisfaction.
- ◆ **Spearheaded a consulting team** who worked with a professional sports franchise to help them develop a long-term e-business strategy. Along with the strategy, a number of strategic initiatives were identified, prioritized and developed into a roadmap to provide guidance. Many different areas of operations (food & beverage, ticketing, licensing/mail order, arena operations, community relations, etc.) were consulted and the final roadmap included an integrated vision shared by all key participants. Completed under budget.
- ◆ **Project Executive** for a development team redesigning and building a new web site for a professional sports franchise. The goal of the new web site was to enhance the fan experience by bringing the in-arena experience out on to the Internet. Features included online games, live scoreboards during games, searchable statistics databases, polling, chats with players and management, robotically-controlled web cams, a streaming video library of team mascot antics, an animated team history timeline, and game recaps with notes from several celebrity commentators. IBM assisted the customer with planning and executing a successful launch ceremony before fans and the media. Project adhered to a very aggressive schedule and was completed within the customer's budget. The new web site achieved nearly 2 Million unique page views in its first month, and nearly 1 Million hits in a four-hour period shortly after launch.
- ◆ **Spearheaded a consulting team** working with a major Canadian company to help it design a new employee intranet infrastructure. The new portal-based infrastructure included hardware and networking architecture components as well as application architectures for a new employee directory and organization structure reporting tool, and a new hire workflow application coordinating the efforts of I/T, real estate, telecommunications, payroll, and other groups within the company. Project was delivered on time and on budget.
- ◆ **Managed a consulting team** which helped a professional sports franchise assess one of their legacy AS/400 operational systems and reconfigure it to improve security and operational efficiency. Project completed significantly under budget and ahead of schedule with a very high level of customer satisfaction.

Jan. 1999     Jan. 2000

*Executive Producer, IBM Interactive Media, IBM Canada Ltd.*

In addition to his Certified Senior Project Manager role at IBM, Mr. Aguanno also was given leadership of the production side of IBM Canada's Interactive Media group. His responsibilities included:

- ◆ Establishing new production (project management) standards for use in the IBM Interactive Media,

- ◆ Site Champion role (within IBM Interactive Media and IBM e-business Services) for the implementation and support of IBM's Worldwide Solution Design and Delivery Methodology (W.S.D.D.M.) along with its supporting PM Tool Suite applications,
- ◆ Educating media producers and other project managers on new PM standards,
- ◆ Conducting project reviews to monitor adherence to new standards,
- ◆ Overseeing the portfolio of projects of the group,
- ◆ Monitoring portfolio (and individual project) financial performance, and
- ◆ Harvesting and disseminating intellectual capital from group projects which could be reused in other projects.

Mar. 1998    Mar. 2001    *ICE Methodology Lead, IBM Canada Ltd.*

Participated in the development and lead customization for the Canadian marketplace of IBM's Interactive Consulting Engagement (I.C.E.) Methodology. Developed tools, marketing and training materials, and conducted training sessions in this requirements gathering and solution design methodology.

Jan. 1997    Jan. 2000    *Certified Senior Project Manager, IBM Canada Ltd.*

- ◆ **Managed production** of a bilingual CD-ROM training application for one of Canada's largest companies. This multimedia application has two hours of technical training on new product offerings to sales people and adapts for use as a presentation aid to clients. This project was delivered on time and under budget, despite repeated client delays and changes.
- ◆ **Managed production and led architecture team** in the production of a hybrid CD-ROM/Internet application for a major Canadian bank supporting their youth banking programme. The CD incorporated a rich interface using classical animation along with music and sound effects. Advanced features for the handicapped were included, and French and stripped-down diskette versions were also produced. The project was delivered on time and on budget, and received exceptionally high customer satisfaction ratings.
- ◆ **Advised** the CIO office of a major Canadian corporation in a consulting role on various options for delivery of Computer Based Training (CBT). Designs were produced and evaluated using stand-alone CD-ROM and networked delivery methods. Many programming languages and multimedia authoring systems were compared.
- ◆ **Architected** a networked multimedia solution delivered via public-access kiosks. System played MPEG-1 video through a streaming server for demand delivery to custom-developed client software. Worked with other architects with specialties including ATM networks, systems management, and Internet technology. **Managed development** of applications for this project through five development teams working in parallel. Projects were all delivered on time, on budget, with a very high level of quality.

- ◆ **Managed** a large usability study for a government ministry. The study produced a set of storyboards for a web site interface to an online database, ready for hand-off to the development team. Recommendations were based upon a large academic literature search, as well as a number of focus group interviews and usability reviews conducted with current users of both the online and printed versions of the data. The final storyboard design was universally accepted as the best possible interface by the user population surveyed.
- ◆ **Managed development** of a government web site linking a complex legacy database to the web, allowing Internet users to conduct advanced queries and view the data in many different ways through their standard web browsers. The project was delivered on time and on budget, with a very high level of customer satisfaction. Final functionality included advanced search capabilities the customer earlier had to exclude due to budget restrictions -- these capabilities were delivered within the reduced budget -- a pleasant surprise to the customer.
- ◆ **Managed design and development** of a web-based training application which taught users how to use another web site. The application included Java-based streaming audio and animations, and one Java-based game. The application was delivered on time, far under budget, with a very high level of customer satisfaction that led the customer returned to the team for another project.
- ◆ **Managed** a million dollar Internet development project for a large holding company which standardized the hosting and e-Commerce application infrastructure for its subsidiary companies, some of which had existing web sites which received over 1 million hits a month. **Spearheaded a consulting team** which worked with each subsidiary to determine their unique requirements, develop a high-level architecture, create a visual “look” for the web unique to each subsidiary which supports/extends their existing brands on the Internet, and then **managed production** of the required Internet applications in the standardized environment. High levels of code reuse between subsidiaries led to reduced overall costs to the parent company, and provided advanced applications that some of the smaller subsidiaries could never have afforded on their own. Projects managed came in on time and under budget, with a strong customer satisfaction rating.
- ◆ **Spearheaded a consulting team** in the design of an eCommerce solution for a mid-sized distribution company. The solution included a web-based catalogue of products, and live connectivity to legacy AS/400 applications, through a highly-secure networking infrastructure, to provide order processing and account status inquiries. The solution exceeded customer expectations and was delivered under budget and on time.
- ◆ **Managed production** of a CD-ROM for a manufacturing company which included detailed product technical specifications all accessed via an attractive interactive menu system. The goal of the project was to reduce printing and distribution costs of technical product specification sheets and other related information distributed to VARs. The project was delivered on time, within budget, with exceptionally high customer satisfaction.
- ◆ **Managed design and production** of a consulting offering which included

speaker support materials utilizing streaming audio, animation, and extensive custom graphics. The resulting offering was translated into several languages and was successfully sold and delivered around the world, generating significant revenues and opening the doors to millions of dollars of new opportunities for the consulting organization.

- ◆ **Managed a development team** and a major contractor through all stages of design and development of a facelift for the Internet web site of a major golf resort in the U.S. The web site included e-commerce components for resume submission, accommodation inventory query and reservation as well as an interactive photo gallery and online feedback and subscription applications. The new web site was an immediate success with an increase in web traffic, longer web site visits, and a sizable amount of online reservations. The web site was completed on time and under budget with an exceptionally high level of customer satisfaction.
- ◆ **Managed the design and development** of a web site for the economic development office of a major municipality. With very short timeframes (less than one month), gathered and formalized requirements, documented and received approval for design, formed a development team, and **led** the project through development and launch. With a very tight budget, short timeframes, and a high-visibility launch with extensive media presence and local celebrities, the political pressures and risk factors on this project were high. Nevertheless, the project was delivered on time and on budget, with exceptionally high customer satisfaction.

Jan. 1996    May 2001    *Instructor, University of Toronto*

and

Jun. 2004    Present

- ◆ **Designed, wrote the instructor and student manuals, and taught** the following courses at the University of Toronto: *Introduction to Multimedia Authoring, Visual Basic Level I, Visual Basic Level II, Digital Delivery Technologies, and Internet Application Development*. Guest lecturer in *Multimedia Interface Design* and *Web Site Implementation and Management* courses. Most of these courses were accredited towards certificate programmes within the University. Won the University of Toronto's prestigious Excellence in Teaching Award in 1999.
- ◆ **Designed and taught** the following courses for the Faculty of Information Studies: *Rewarding Employees without Breaking the Bank*, and *Rewarding Performance with Non-Monetary Rewards*.

May 1993    Dec. 1996    *Production Manager/Client Liaison, O'Hara Systems Inc.*

- ◆ **Spearheaded a production team** in the design and creation of a multimedia kiosk for a major Canadian brewery, delivered on time and under budget. The kiosk gathered customer names, addresses, and personal preferences for a national database marketing initiative. Deployed and supported kiosks in three provinces and gathered thousands of customer profiles over an 18-month period. Quality and accuracy to price ratios were much higher than any other method previously used by the customer. Won three international awards (InVision Gold Award, Comdex 1995; Best of Category, Sales and Marketing Award, and an Award of Technical Merit, 1995 International Digital Media Awards), receiving extensive media coverage.
- ◆ **Designed & led the production team** of a highly-publicized multimedia

kiosk for selling flowers. The kiosk features an interface which automatically adapts to the season, and includes the entire catalogues of two major international floral wire-order companies. When flowers are ordered and paid for by credit card, the kiosk faxes the flower wire-order to the sponsoring florist for processing. These kiosks provide florists with cost-effective methods for achieving market presence in areas which wouldn't support a floral retail outlet. Kiosks are installed across the U.S. and Canada. An automated polling system queries the kiosks once per week from a central location to download statistics and diagnostic information through a custom BBS back door before emailing or faxing data to florists and support personnel.

- ◆ **Designed & led the production team** of a multimedia kiosk for a major insurance company which quotes life, home, tenant, and auto insurance rates. Development included complex insurance rating modules utilizing actuarial formulae. The kiosk sells certain products, paid for by credit card, and prints actual policies. Kiosks are distributed across Ontario, have captured hundreds of leads for agents, and have sold many policies. Dozens of magazine, newspaper, and radio articles on the kiosk led to a very high exposure, and a high customer satisfaction rating.
- ◆ **Managed upgrade projects** to a multimedia kiosk system for a major Canadian bank. Kiosks were distributed in branches and shopping malls to retail a number of insurance products. Upgrades included software, graphics, data, multimedia, and hardware.
- ◆ **Designed & led the production team** of a CD-ROM training application for the Ontario government. The 4-CD application simulates the province's online Land Registry System, POLARIS, and provides in-depth training through exercises, extensive tests, and video/audio narration over 12-days of training. The resulting application was distributed to all provincial LROs, resulting in huge savings in training and travel costs. The application was so successful that, recently, more modules were added, making up a total of 16 days of training on 5 CDs.
- ◆ **Designed & led the production team** which Designed & developed a Web site for a major life insurance company with live, online insurance quotes, a Last Will and Testament generator and a Power of Attorney generator. These CGI applications were developed to provide the company with a means of getting sales leads, and to market a new type of Salary Insurance not sold through their regular broker network. The site drew much attention, and sold many policies over its first six months.
- ◆ **Designed & led the production team** of a Web site for a major political party with online ordering and feedback CGI applications. This high-traffic site achieved over 60,000 hits in its first month of existence, with over 100 feedback responses being generated each day.
- ◆ **Designed & led the production team** of a networked application being used by travel agents across North America to print travel advisories for clients who are visiting over 270 countries around the world. Both the advisories and the interface are available in several languages. Liability issues related to non-disclosure of warnings and entry requirements are eliminated using this package. **Designed & produced** database editing software to create and manage the databases used by the aforementioned

application. **Designed & produced** a pay-for-access Web site which allowed the public to pay for queries against the database. This application, delivered in 1995 was one of the first e-Commerce Web sites in Canada. Web-based maintenance and administration tools were developed to facilitate site management by the client.

- ◆ **Designed & led the production team** of a touch screen pay-for-use multimedia kiosk as part of a joint-venture with a large international hotel chain. Kiosks would sell Web and email access to business travelers. The project was delivered on time and on budget with a high level of quality.
- ◆ **Designed & led the production team** of a multimedia kiosk used by a transit authority to provide on-demand printing of bus schedules. The kiosk cut costs by reducing the need to print and distribute schedules which were sitting in excess inventory and eventually discarded.

Oct. 1990    Apr. 1993

*Vice President, Corporate Computer Services Inc. also  
General Manager, DataPro Computer Training Ltd. (a subsidiary  
of Corporate Computer Services Inc.)*

- ◆ Responsibilities included building and managing the computer training business for the company, including hiring and managing the contract trainers. Was the lead negotiator in a bid to get licensed by the Ministry of Colleges and Universities as a licensed private professional school for computer training.

In addition to the training business development, responsibilities extended to the building of a medical office management and billing software division, including requirements gathering, supervising systems design, hiring and managing staff programmers, liaising with the WCB and OHIP departments responsible for dealing with software providers, and speaking at medical conventions and trade shows.

Feb. 1990    Oct. 1990

*Development Manager, Allseasons Environmental Controls Ltd.*

- ◆ **Designed & managed development** of inventory tracking and management software along with database-driven applications to support warranty maintenance and sales tracking.

## **Memberships & Certifications**

- **Canadian Government Security Clearance:** Secret (Level 2)
- **IBM Certified Executive Project Manager** (2006-Present; Recertified in 2009)
- **IBM Certified Specialist for Rational Unified Process** (2006)
- **Certified Senior Project Manager** (International Project Management Association: Level-B, 2006)
- **Assessor** of project management competency using the IPMA 4-Level PM Competency Assessment Model for both the American Society for the Advancement of Project Management (2006-Present) and the Project Management Association of Canada (2009-present). One of four “first assessors” accredited by the International Project Management Association to perform these assessments each of the two countries.

- **Director, Project Management Association of Canada** (2006-Present)
  - **Founding Director** (2006- 2008)
  - **Director of Professional Development** (2009)
- **Vice President, Project Management Association of Canada** (2010)
- **Founding Member, Project Management Association of Canada** (2006-Present)
- **Member, American Society for the Advancement of Project Management** (2006-Present)
- **External Reviewer** for the Global PM Standards working group's (coordinated by the International Project Management Association) draft framework for "Global Performance Based Standards for Project Management Personnel." (2003 and 2005)
- **Reviewer** for the International Council for Project Management Advancement's (ICPMA) draft national standard for Standards Australia entitled "Project Performance Measurement Using Earned Value" v5.6 (2002)
- **Member, PMI Standards Development Team** for *OPM3: Organizational Project Management Maturity Model*, Project Management Institute (2001- 2002). PMI recognized the contribution with a Certificate of Appreciation and with his contribution recognized on page 65 of the published standard.
- **Certificate in MS Project 2000**, Brainbench (Mar. 2002). 11th highest score worldwide.
- **Certificate in Project Management**, Brainbench (Sept. 2001)
- **Full Member (MAPM)**, Association for Project Management, UK (2000- Present)
- **Master's Certificate in Project Management** (1999), George Washington University
- **IBM Certified Senior Project Manager** (1999-2005; Recertified in 2002)
- **Best Practices Committee Chairman** (1999-2002), New Grange Center for Project Management.
- **Certified Project Management Professional** (1999-Present; Recertified in 2002, 2005, 2009) by the Project Management Institute (PMI).
- **Member, Project Management Institute** (1999 – Present).
- **Member, Advisory Committee** (1998 - 2001), School of Continuing Studies, University of Toronto.
- **Member, Awards Selection Committee** (1998, 2000), School of Continuing Studies, University of Toronto.
- **Member, Director's Advisory Council** (1995 - 1998), New Media Management Programme, School of Continuing Studies, University of Toronto.
- **Advisor to the Director** (1997 - 1998), Internet Business and Technology Programme, School of Continuing Studies, University of Toronto.
- **University of Western Ontario (2001 - 2003):** Part time study, courses in Technical Writing and Statistics.
- **University of Guelph (1991 - 1992):** Instructional Systems Design, Organizational Development, Training Delivery Techniques.
- **Bachelor of Arts** from the University of Western Ontario. London, Ontario, Canada.
- **University of Western Ontario (1986 - 1989):** Majored in English and Linguistics. Focus of studies/ research was Computational Linguistics.

## Publications

- “*Utilizing Offshore Tax Havens.*” Article in Vol. 1 No. 2 edition Of Small Business Support Services, August 1990.
- “*Tips for Modern Salespeople.*” Article in Vol. 1 No. 3 edition Of Small Business Support Services, October 1990.
- “*Pulling the Plug on Computer Viruses.*” Article in Vol. 1 No. 3 edition Of Small Business Support Services, October 1990.
- Offshore Report: Banking and Finance in Tax Havens. Book published by Multi-Media Publications Inc., 1990.
- We Need Help! How to sell your superiors on a training programme. Book published by Multi-Media Publications Inc., 1990.
- “*Using the Critical Resource Path.*” Article in the May 2002 edition of Project Magazine. **Abstracted in Projects and Profits**, August 2002.
- “*Mapping Out the Project: A WBS is a critical project planning tool. Why is it so misunderstood?*” Article in the May/June 2002 edition of Projects@Work magazine. Contributor.
- “*Using the Critical Resource Path*” in the MBA-programme text Book of Readings in Project Management published by the Institute of Chartered Financial Analysts of India (ICFAI)- Centre for Management Research.
- “*Using the Critical Resource Path to Reduce Project Risk.*” Article in the July 2002 edition of Inside Project Management.
- “*Manage Change Better Using SCRUM.*” Article in the August 2002 edition of Inside Project Management.
- “*‘Business Value’ as a Factor in Software Design Projects.*” Article in the Vol. 3, No. 7 (September 2002) issue of Project Magazine. **Reprinted in PM Boulevard**, Issue 124, October 2002.
- “*Work more efficiently using a Focused Work Breakdown Structure.*” Article in the November 2002 edition of Inside Project Management.
- “*Beyond the PMP: Advanced Project Management Certification.*” Article in the December 2002 edition of PM Word Today. Archived on the PMForum.org web site.
- “*Advanced Project Management Certification Options.*” Article in the February 2003 edition of Inside Project Management.
- Agile Project Management Using SCRUM. Audiocassette published by Multi-Media Publications Inc., March 2003; re-released on Audio CD in July 2005.
- “*Using Budget Burn Rate to Forecast Interim Project Costs Effectively.*” Article in the March 2003 edition of Inside Project Management.
- So You Think You’re Done? What to Do After the Launch. Audiocassette published by Multi-Media Publications Inc., April 2003
- “*Be Taken Seriously: Create a Professional Image.*” Article published in the July 2003 edition of Inside Project Management
- “*Watch Out for Hidden Culture-Specific References in Multicultural Projects.*” Article published in the August 2003 edition of Inside Project Management
- “*Using 3-Point Estimates to Reduce Project Risk.*” Article published in the September 2003 edition of Inside Project Management
- “*Motivating Team Members During Tough Times.*” Article co-written with Matthew David published in the November 2003 edition of Inside Project Management
- “*Analyze Your Readers for More Effective Status Reports*” Article published in the November 2003 edition of Inside Project Management

- "Low-cost Ways to Reward Your Project Team Members." Article published in the November 2003 edition of Inside Project Management
- "Tips for Turning Around Troubled Projects" Article published in the November 2003 edition of Inside Project Management
- "Use Two Types of Contingency to Reduce Project Risk" Article published in the December 2003 edition of Inside Project Management
- "Ten Tips for Better Managing Contractors" Article published in the December 2003 edition of Inside Project Management
- 101 Ways to Reward Team Members for \$20 (or Less!). Book published in the February 2004 by Multi-Media Publications Inc.
- Managing Agile Projects. Book published in January 2005 by Multi-Media Publications Inc. Editor.
- Stealth Methodology Adoption. eBook published in February 2005 by Multi-Media Publications Inc.
- An Introduction to Agile. eBook published in February 2005 by Multi-Media Publications Inc.
- Managing in the Face of Ever-Changing Requirements. Audiobook on CD published by Multi-Media Publications Inc., July 2005.
- S-T-R-E-T-C-H Your Rewards Budget: Maximize the Return on your Employee Recognition Investment. Audiobook on CD published by Multi-Media Publications Inc., July 2005.
- So, You Think You're Done? Audiobook on CD published by Multi-Media Publications Inc., January 2006.
- "A Review of 'Strike Terror' by Bob McElwain." A book review published by TCM Reviews. 2006.
- "A Review of 'The Papyrus Document' by Michael Cole." A book review published by TCM Reviews. 2006.
- "A Review of 'The Wrekening' by Javel Gibson." A book review published by TCM Reviews. 2006.
- "A Review of 'Building Scalable Web Sites' by Cal Henderson." A book review published by TCM Reviews. 2006.
- Foreword to 365 Answers About Human Resources for the Small Business Owner: What Every Manager Needs to Know About Workplace Law by Mary Holihan. Published by Atlantic Publishing Group Inc., June 2006.
- "A Review of 'Laguna' by Michael Putegnat." A book review published by TCM Reviews. 2006.
- "A Review of 'Deceit' by James Siegel." A book review published by TCM Reviews. 2006.
- "A Review of 'The Embroidered Corpse' by Brian Kavanagh." A book review published by TCM Reviews. 2006.
- "A Review of 'Graveyard Eyes' by David Chacko." A book review published by TCM Reviews. 2006.
- "A Review of 'The Mission Song' by John Le Carre." A book review published by TCM Reviews. 2006.
- "A Review of 'No Yelling: The 9 Secrets of Marine Corps Leadership you Must Know to Win in Business' by Wally Adamchik." A book review published by TCM Reviews. 2006.
- "A Review of 'The Best Secrets of Great Small Businesses' by Ray Silverstein." A book review published by TCM Reviews. 2006.
- Extreme Scrum. Audiobook on CD published by Multi-Media Publications Inc., March 2008.
- Stealth Methodology Adoption. Audiobook published by Multi-Media Publications Inc., June 2008.
- Agile Adoption Made Easy. Audiobook published by Multi-Media Publications Inc., June 2008.
- Introduction to Agile Modeling. Audiobook published by Multi-Media Publications Inc., December 2008.

- Save Time and Money with Agile Documentation Practices. Audiobook published by Multi-Media Publications Inc., December 2008.
- Agile Project Performance Management: Using Agile Metrics to Better Monitor and Control Agile Development Projects. Audiobook published by Multi-Media Publications Inc., March 2009.
- The Story Behind Feature-Driven Development. Co-authored with Jeff DeLuca. Audiobook published by Multi-Media Publications Inc., April 2009.
- ScrumButs: The Dangers of Customizing Scrum Co-authored with Ken Schwaber. Audiobook published by Multi-Media Publications Inc., April 2009.
- “*Just Say No to Project Management Charlatans.*” Project Times. May 2009.
- “*A Fresh Approach to Project Management Training.*” Project Times. June 2009.
- “*The Need for an Annual Project Management Award.*” Project Times. July 2009.
- The Agile PMO: From Process Police to Adaptive Governance. Co-authored with Sanjiv Augustine. Audiobook published by Multi-Media Publications Inc., August 2009.
- “*Ending the Methodology Wars.*” Project Times. August 2009.
- “*Best Practices are Still Best Practices.*” Project Times. September 2009.
- “*Getting PM Training Without Breaking the Bank.*” Project Times. October 2009.
- “*Project Managers vs. Scrum Masters: Agile Project Management Matures.*” Project Times. November 2009.
- “*The ‘Ideal’ Iteration Length Revealed...*” Project Times. December 2009.
- “*What Value does a PM Provide at the End of a Project.*” Project Times. January 2010.
- “*Project Managers Can Shine in Today’s Tough Economy.*” Project Times. March 2010.
- Adapting Agile for Use with Distributed Teams. Co-authored with Scott Ambler. Audiobook published by Multi-Media Publications Inc., April 2010.
- Dispelling Common Myths About Agile. DVD published by Multi-Media Publications Inc., April 2010.
- The Agile Planning Game: Rapid Estimating and Scheduling for High-Change Projects. DVD published by Multi-Media Publications Inc., April 2010.
- “*The Change Control Myth.*” Project Times. April 2010.
- “*Is There Any Value to PM Certification?*” Project Times. May 2010.

## **Presentations**

- Delivered a series of lectures on multimedia and Internet technologies for several companies including Xerox and Northern Telecom (1994 - 1996)
- Delivered a series of presentations on multimedia and kiosk technologies at conferences including COMDEX (1994-1996)
- “*Building Brand with Effective Web Site Design.*” Co-presented at the Maximizing Web Site Usability conference in Toronto, February 2000.
- “*Managing Complex Web Development Projects: A Case Study.*” Co-presented at the NewMedia 2000 conference in Toronto, May 2000.
- “*Marketing Talent in e-Biz.*” Roundtable discussion hosted by the American Marketing Association at the Toronto COMDEX, July 2000.

- “*So You Think You’re Done? What to Do After the Launch.*” Presented at the ProjectWorld 2001 conference in Toronto, March 2001.
- “*Agile Project Management Using SCRUM.*” Presented at the PMI Durham Highlands chapter in Whitby, ON, November 2002.
- “*Agile Project Management Using SCRUM.*” Presented at the PMI Lakeshore chapter in Oakville, ON, March 2003.
- “*Agile Project Management Using SCRUM.*” Presented at the ProjectWorld Boston 2003 conference in Boston, Massachusetts, June 2003.
- “*Agile Project Management Using SCRUM.*” Presented at the CIPS: Canadian Information Processing Society in Toronto, ON, June 2003.
- “*Agile Project Management Using SCRUM.*” Presented to the IT division of a major health services corporation in Rochester, Minnesota, August 2003.
- “*Rewarding Employees Without Breaking the Bank.*” Presented to the Durham Highlands Chapter of the Project Management Institute in Whitby, Ontario, April 2004.
- “*Ever-Changing Requirements? Use Agile Methods to Reduce Project Risk.*” ½ day workshop delivered at the Informatics 2004 conference (annual conference of the Canadian Information Processing Society – CIPS) in Hamilton, Ontario, May 2004.
- “*Agile Techniques for Managing Agile Projects.*” Presented at ProjectWorld 2004 in Toronto, Ontario, May 2004.
- “*Agile Project Management Using Scrum.*” Presentation delivered to the PMI Information Systems SIG local chapter in Toronto, Ontario, May 2004.
- “*Agile Techniques for Managing Agile Projects.*” Presentation delivered to the XPToronto agile users group in Toronto, Ontario, June 2004.
- “*Team Rewards and Employee Retention.*” A workshop presented to the Thriving in Management Today event hosted by Canadian Women in Communications in Toronto, Ontario, June 2004.
- “*Boosting Team Morale.*” Presentation delivered to the project management staff of a large department in a major consultancy in Toronto, Ontario, October 2004.
- “*Agile Project Management Using Scrum.*” Presentation delivered to a symposium hosted by the PMI CTT Chapter in Kitchener, Ontario, October 2004.
- “*Agile Techniques for Managing Agile Projects.*” Presentation delivered via international teleconference two times to hundreds of project managers around the world on behalf of a large consulting company, November 2004.
- “*Rewarding Employees without Breaking the Bank.*” One day course delivered at the University of Toronto in Toronto, Ontario, November 2004.
- “*The Benefits of Agile Development Methods.*” A crash-course in agile development methods for business managers for a major airline in Montreal, Quebec, November 2004.
- “*Agile Software Development Techniques.*” A presentation delivered via teleconference to the product owner, project managers, and technical leads of a product used internally by a major transnational corporation. February 2005.
- “*Agile Techniques for Managing Agile Projects.*” Presented at the PMI SouthWest Ontario Chapter Symposium in London, Ontario, April 2005.
- “*Getting Started with Scrum.*” A presentation delivered via teleconference to a USA-based team redeveloping a very large software package. April 2005.

- “*An Overview of Extreme Programming.*” A presentation delivered via teleconference to senior managers of a large technology consulting company. April 2005.
- “*Stealth Methodology Adoption.*” Presented at a meeting of Toronto SPIN (Software Process Improvement Network), Toronto, Ontario. April 2005.
- “*The Great Escape: Troubled Project Recovery Using Agile Project Management.*” Presented at the Canadian Project Excellence Awards, Toronto, Ontario. April 2005.
- “*Stealth Methodology Adoption.*” Presented to the CMMI deployment team within a large corporation, Markham, Ontario. May 2005.
- “*Motivating your Team -- What Works for You?*” A roundtable discussion hosted at ProjectWorld 2005, Toronto, Ontario. May 2005.
- “*Agile Project Management: Managing in the Face of Ever-Changing Requirements.*” Presented at ProjectWorld 2005, Toronto, Ontario. May 2005.
- “*An Overview of Agile and Extreme Programming.*” Presented to senior managers of a large utility company, Toronto, Ontario. June 2005.
- “*Agile Techniques for Managing Agile Projects.*” Presentation delivered via international teleconference two times to hundreds of project managers around the world on behalf of a large consulting company. June 2004.
- “*The Difference Between Good and Great Businesses.*” Presented to the Impact@Shad workshop, Trent University, Peterborough, Ontario. July 2005.
- “*Agile Techniques for Managing Agile Projects.*” Presented via teleconference to a group of software engineers and IT project managers for an international software development company. September 2005.
- “*Agile Project Management: Managing in the Face of Ever-Changing Requirements.*” Presented at IBM’s 2005 Project Management Leadership Exchange, Orlando, Florida. October 2005.
- “*The Great Escape: Troubled Project Recovery using Agile Project Management.*” Presented at IBM’s 2005 Project Management Leadership Exchange, Orlando, Florida. October 2005.
- “*Agile Techniques for Managing Agile Projects.*” Presented to the Montreal Software Process Improvement Network (Montreal SPIN), Université du Québec, Montreal, Quebec. November 2005.
- “*Getting Results from your Team.*” Presented at the Impact! 2005 Conference, Toronto, Ontario. November 2005.
- “*Rewarding Employees without Breaking the Bank.*” Presented at the Ontario Library Association’s OLA SuperConference 2006, Toronto, Ontario. February 2006.
- “*Rewarding Team Members without Breaking the Bank.*” Presented at the Golden Key International Honour Society’s Unlock Your Potential Conference, Toronto, Ontario. February 2006.
- “*Rewarding Team Members without Breaking the Bank.*” Facilitated a roundtable discussion at IBM’s 2006 Technical Leadership Exchange, Orlando, Florida. March 2006.
- “*Managing in the Face of Ever-Changing Requirements.*” Presented at IBM’s 2006 Technical Leadership Exchange, Orlando, Florida. March 2006.
- “*Agile Projects: How to Get Started.*” Teleconference presented to the software process engineering group in one division of a large international corporation. March 2006.
- “*Using Agile Methods to Handle Changing Requirements.*” Guest lecturer for a 3<sup>rd</sup>-year software engineering course at Ryerson University, Toronto, Ontario. March 2006.
- “*Managing in the Face of Ever-Changing Requirements.*” Teleconference presented to one division of a large software development company. March 2006.

- *“The Great Escape: Troubled Project Recovery using Agile Project Management.”* Presentation delivered via international teleconference two times to hundreds of project managers around the world on behalf of a large consulting company. April 2006.
- *“Agile Processes for Application Services.”* Teleconference presented to a U.S. group of architects, project managers, and software developers working for a custom application development organization. April 2006.
- *“Agile Project Management.”* Teleconference delivered to an Indian software development outsourcing company and their Swedish customer. April 2006.
- *“Systems Development Project Management.”* Two-day workshop delivered at ProjectWorld 2006, Toronto, Ontario. May 2006.
- *“OPM3: Dare You Go There?”* Facilitated a panel discussion at ProjectWorld 2006, Toronto, Ontario. May 2006.
- *“Agile Project Management: Managing in the Face of Ever-Changing Requirements.”* Seminar presented at ProjectWorld 2006, Toronto, Ontario. May 2006.
- *“An Introduction to Agile Development.”* Presented via teleconference to a business unit within a large multi-national corporation interested in moving towards agile development practices. June 2007.
- *“Personal Effectiveness: Goal setting and time management in a multi-project environment.”* Classroom course delivered to staff of a major drug company. Toronto, Ontario. June 2007.
- *“Agile Project Management: Managing in the Face of Ever-Changing Requirements.”* Presentation delivered via international teleconference two times to hundreds of project managers around the world on behalf of a large consulting company. July 2006.
- *“Metrics for Managing Agile Projects.”* Presented via teleconference to an industry software development lab for a large software company. August 2006.
- *“An Introduction to Agile Development (Scrum and XP).”* Class taught to third-year software engineering students at Ryerson University. Toronto, Ontario. September 2006.
- *“An Introduction to Agile Development.”* Class taught to the interactive media division of a major broadcaster. Toronto, Ontario. September 2006.
- *“Agile Requirements Management, Modeling, and Concurrent Design.”* Class taught to the interactive media division of a major broadcaster. Toronto, Ontario. October 2006.
- *“Agile Estimating and Planning.”* Class taught to the interactive media division of a major broadcaster. Toronto, Ontario. October 2006.
- *“Rewarding Employees Without Breaking the Bank.”* One-day workshop taught to the managers of a regional government. Sarnia, Ontario. October, 2006.
- *“Agile Change Management and Negotiating with Stakeholders.”* Class taught to the interactive media division of a major broadcaster. Toronto, Ontario. October 2006.
- *“Agile Metrics, Control, and Status Reporting.”* Class taught to the interactive media division of a major broadcaster. Toronto, Ontario. November 2006.
- *“Agile Testing.”* Class taught to the interactive media division of a major broadcaster. Toronto, Ontario. November 2006.
- *“How to Reward Teams for Less than \$20.”* Presentation to the members of a chapter of the Project Management Institute (PMI). Boston, Massachusetts. December 2006.
- *“Rewarding Team Members to Boost Project Performance.”* Teleconference hosted by Eli Journals. March 2007.
- *“Managing in the Face of Ever-Changing Requirements.”* Seminar presented at ProjectWorld 2007, Toronto, Ontario. March 2007.

- *“Systems Development Project Management: Traditional, Extreme, or Somewhere in the Middle?”* Seminar presented at ProjectWorld 2007, Toronto, Ontario. March 2007.
- *“Using Agile Project Management to Increase SOA Implementation Success.”* Seminar presented at a conference hosted by Statistics Canada entitled “Enterprise Architecture - the 3 Rs: Reduce, Reuse, Recycle,” Ottawa, Ontario. April 2007.
- *“Agile Estimating and Planning.”* Seminar presented at a conference hosted by Statistics Canada entitled “Enterprise Architecture - the 3 Rs: Reduce, Reuse, Recycle,” Ottawa, Ontario. April 2007.
- *“Managing in the Face of Ever-Changing Requirements.”* Teleconference hosted by Eli Journals. April 2007.
- *“Agile Techniques for Managing Agile Projects.”* Presentation delivered via teleconference to project managers from a large computer electronics manufacturing company. April 2007.
- *“The Great Escape: Troubled Project Recovery Using Agile Project Management.”* Presented at IBM’s 2007 Technical Leadership Exchange, Anaheim, California. April 2007.
- *“Agile Project Management: Managing in the Face of Ever-Changing Requirements.”* Presented at IBM’s 2007 Technical Leadership Exchange, Anaheim, California. April 2007.
- *“Agile Estimating and Planning.”* Presentation delivered via international teleconference two times to hundreds of project managers around the world on behalf of a large consulting company. August 2007.
- *“Agile Project Management Town Hall Event.”* One of five panellists fielding questions on agile project management from approximately four hundred project managers from around the world in this highly-rated event. October 2007.
- *“Extreme Scrum: 200 team members in 17 cities on a high-risk project.”* Presented at CASCON 2007. Toronto, Ontario. October 2007.
- *“The Great Escape: Troubled Project Recovery Using Agile Project Management”* Seminar presented at Project Summit & BusinessAnalystWorld Boston 2007, Boston, Massachusetts. October 2007.
- *“Agile Project Management in IBM.”* Presentation delivered via teleconference to corporate HR managers in Somers, NY on how senior managers can initiate agile projects with development teams. January 2008.
- *“Agile Has Crossed the Chasm, an Extreme Agile Case Study”* Presented at an Agile@IBM Toronto Community-Sponsored Event, Markham, Ontario. Co-presented with Paul Simms and Scott Ambler. Toronto, Ontario. January 2008.
- *“Agility at Scale: Applying Agile Software Development Techniques on Real-World Projects.”* Presented at a meeting of the Toronto Software Process Improvement Network (Toronto SPIN). Co-presented with Scott Ambler. Markham, Ontario, February 2008.
- *“Agile Estimating and Planning.”* Presentation delivered via international teleconference two times (to cover multiple time zones) to four hundred project managers around the world on behalf of a large consulting company. February 2008.
- *“Agile Project Performance Management.”* Presentation delivered as a webinar for the PMI Metrics SIG as part of its online conference. April 2008.
- *“Rewarding Team Members to Improve Project Performance.”* Presentation delivered to a Peterborough-area project management interest group gathering sponsored by Siemens. Peterborough, Ontario, April 2008.
- *“Rewarding Team Members without Breaking the Bank.”* Presentation delivered to senior (AVP and above) executives at one of Canada’s largest financial institutions. Toronto, Ontario, May 2008.
- *“Managing in the Face of Ever-Changing Requirements.”* Presentation delivered at the PMI New Jersey Chapter’s 2008 Regional Symposium. Edison, New Jersey, May 2008.
- *“Stealth Methodology Adoption.”* Presentation delivered to the PMI Information Systems Local Interest Group. Toronto, Ontario, May 2008.

- “*Agile Project Management: A Business Perspective.*” Presentation delivered to the management of a large insurance company. Waterloo, Ontario, June 2008.
- “*The Great Escape: Troubled Project Recovery Using Agile Project Management.*” Presentation delivered via teleconference to the project management community of a technology (hardware) division of a major international corporation. June 2008.
- “*Agile Estimating and Planning.*” Workshop delivered to a cross-functional group of employees of an international software company. Waterloo, Ontario, July 2008.
- “*An Introduction to Agile Project Management.*” Presented at a senior management meeting of a large insurance company. Toronto, Ontario, August 2008.
- “*Introducing the Project Management Association of Canada.*” Presented at the Project Business Connections conference hosted by the University of Toronto’s Faculty of Applied Science and Engineering. Toronto, Ontario, August 2008.
- “*Introduction to Agile Project Management.*” Presented via teleconference to the management of an energy company and an IT service provider joined in a strategic delivery relationship. September 2008.
- “*Extreme Scrum.*” Presented to the agile users group of a large international bank via teleconference. September 2008.
- “*Saving Time and Money with Agile Documentation Practices.*” Presentation delivered via international teleconference to over 250 project managers around the world on behalf of a large consulting company. October 2008.
- “*Agile Project Performance Management.*” Presentation delivered to the 2008 Professional Development Days conference of the PMI Central Iowa Chapter. Des Moines, Iowa, October 2008.
- “*Stealth Methodology Adoption.*” Presentation delivered to the 2008 Professional Development Days conference of the PMI Buffalo Chapter. Buffalo, New York, October 2008.
- “*Introduction to Agile Project Management.*” Presentation delivered to VPs of a large insurance company. Toronto, Ontario, October 2008.
- “*Stealth Methodology Adoption.*” Presentation delivered to the 2008 Professional Development Days symposium of the PMI Canada’s Technology Triangle chapter. Waterloo, Ontario, October 2008.
- “*The Great Escape: Troubled Project Recovery.*” Teleconference presented to managers in a cross-industry event hosted by a U.S.-based management training organization. November, 2008.
- “*Agile Project Management.*” 3-day course taught at the Faculty of Engineering and Applied Science at the University of Toronto. Toronto, Ontario, November 2008.
- “*Save Time and Money with Agile Documentation Practices.*” International teleconference sponsored by publishing company. November 2008.
- “*Agile Adoption Best Practices.*” Teleconference with senior managers from a large insurance company. December 2008.
- “*Agile Project Performance Management.*” Seminar delivered at the 2009 Strategic Project Management in the Public Sector conference hosted by the Conference Board of Canada. Ottawa, Ontario, January 2009.
- “*The Magic of Iteration Zero.*” Presentation delivered to the IT organization of a large company. Montreal, Quebec, January 2009.
- “*Agile Management – A Business Strategy for Today’s Economy.*” Presentation and interview on *The Charmaine Show*, WJJC 1270AM. Commerce, Georgia, January 2009.
- “*Adapting Agile for Use with Distributed Teams.*” Teleconference co-presented with Scott Ambler to an international audience. January 2009.

- “*The Agile Planning Game: Rapid Estimating and Scheduling for High-Change Projects.*” Webinar hosted by a publishing company to an international audience. January 2009.
- “*The Great Escape: Troubled Project Recovery Using Agile Project Management.*” Presentation given to the local project management leadership community, hosted by an electronics manufacturing company. Peterborough, Ontario, February 2009.
- “*Recession-Proof your Business with Agile Management.*” Teleconference co-presented with Mishkin Berteig to an international audience. March 2009.
- “*The Great Escape: Troubled Project Recovery Using Agile Project Management.*” Seminar delivered at the 2009 Professional Development Days event hosted by the PMI Mile Hi Chapter. Denver, Colorado, March 2009.
- “*Introduction to Agile Estimating and Planning.*” Teleseminar delivered live to the PMLessonsLearned.com audience and later provided in its popular podcast. March 2009.
- “*Strategic Methodology Selection: Waterfall to Extreme and Points In Between.*” Seminar presented to the 2009 Enterprise Architecture Lifecycle Conference. Toronto, Ontario, March 2009.
- “*Get Your Career on the Fast Track – Now!*” Teleseminar co-presented with Michelle Casto to an international audience. April 2009.
- “*Dispelling Common Myths About Agile.*” Presentation delivered via international teleconference to over 250 project managers around the world on behalf of a large consulting company. April 2009.
- “*Disciplined Agile and Scaling Agile.*” Presentation delivered to a meeting of senior IT executives at a major Canadian bank. Toronto, Ontario, April 2009.
- “*The Story Behind Feature-Driven Development.*” Teleseminar co-presented with Jeff DeLuca. April, 2009.
- “*ScrumButs: The Dangers of Customizing Scrum.*” Teleseminar co-presented with Ken Schwaber. April, 2009.
- “*The Methodology Melting Pot.*” Participant in a panel discussion at the ProjectWorld Toronto conference. Toronto, Ontario, May 2009.
- “*Dispelling Common Myths About Agile.*” Webinar hosted by a publishing company to an international audience. May 2009.
- “*Agile Project Performance Management.*” Webinar hosted by the IBM Project Management Centre of Excellence to over 260 project managers. June 2009.
- “*Advanced Topics in Agile Management.*” Seminar presented at Trent University, courtesy of the Department of Computer Science. Peterborough, Ontario, June 2009.
- “*Strategic Methodology Selection: Waterfall to Extreme and Points In Between.*” Seminar presented to the Toronto IT Architecture User Group. Toronto, Ontario, June 2009.
- “*The Agile PMO: From Process Police to Adaptive Governance.*” Teleseminar co-presented with Sanjiv Augustine. June 2009.
- “*Project Closeout Best Practices.*” Teleseminar delivered live to the PMLessonsLearned.com audience and later provided in its popular podcast. July 2009.
- “*Dispelling Common Myths About Agile.*” Webinar delivered live to PM staff from a large U.S. defence contractor. August 2009.
- “*Spend Analysis versus Spend Intelligence: More than Just a Semantic Difference.*” Co-presented in a panel discussion on the PI Window on Business radio show hosted on the BlogTalk Radio Network. September 2009.
- “*Save Time and Money with Agile Documentation Practices.*” Presented at the PMI Central Iowa Chapter Professional Development Day. Des Moines, Iowa, October 2009.

- *“Dispelling Common Myths About Agile.”* Presented at the PMI Central Iowa Chapter Professional Development Day. Des Moines, Iowa, October 2009.
- *“Introduction to Agile Project Management.”* Taught a 3-day course ending with the Certified Agile Project Manager (Cert.APM) exam for participants. Toronto, Ontario, October 2009.
- *“Save Time and Money with Agile Documentation Practices.”* Webinar delivered to an international audience of PMs. November, 2009.
- *“Agile Project Management: An Overview.”* Lecture presented to a combined audience of project management students and members of the public at Trent University. Peterborough, Ontario, November 2009.
- *“Introduction to Agile Project Management.”* A 3-day course ending with the Certified Agile Project Manager (Cert.APM) exam for participants. Toronto, Ontario, November 2009.
- *“The Agile Planning Game.”* Webinar delivered to an international audience of PMs. January 2010.
- *“The Great Escape: Recovering Troubled Projects using Agile Methods.”* Webinar delivered to an international audience of PMs. January 2010.
- *“Introduction to Agile Project Management.”* A 3-day course ending with the Certified Agile Project Manager (Cert.APM) exam for participants. Toronto, Ontario, February 2010.
- *“How Agile Methods Work for a Testing Horizontal.”* A teleconference held for the management team of a testing services division of an international IT consulting company. April 2010.
- *“Introduction to Agile Project Management.”* A 3-day course ending with the Certified Agile Project Manager (Cert.APM) exam for participants. University of Toronto, School of Engineering and Applied Science. Toronto, Ontario, April 2010.
- *“Mapping of GS Method (‘Portal Engagement Model’) to Agile Methods.”* Webinar delivered to the IBM Canada portal services competency. April, 2010.
- *“Everything You Wanted to Know About the PMAC-AGCP CPMA (IPMA Level-D) Certification.”* Webinar delivered to an audience of PMs internationally. Hosted by the Project Management Association of Canada. June, 2010.

## **Awards & Recognition**

- **AMTEC Award of Excellence** for a CD-ROM developed for York University (Association for Media and Technology in Education in Canada - AMTEC 2000)
- **NewMedia InVision Gold Award** for Sales and Marketing (Spring COMDEX, 1995)
- **Best of Category**, Sales and Marketing (1995 International Digital Media Awards)
- **Award of Technical Merit** (1995 International Digital Media Awards)
- **Seven IBM Team Success Awards** (2 x 1997, 2 x 1998, 2000, 2001, 2003)
- **IBM Individual Achievement Award** (Summer 1998)
- **IBM Special Contribution Award** (Summer 2000)
- **IBM Intellectual Capital Development Award** (2003)
- **IBM Thanks! Award** (2 x 2004, 2006, 3 x 2007, 3 x 2008, 3 x 2009)
- **IBM Leadership Award** (2003)
- **IBM Ovation (“The Best of IBM”) Award** (2005)
- **IBM Team Ovation (“The Best of IBM”) Award** (2005)

- **IBM Bravo! Appreciation Award** (2005)
- University of Toronto's **SCS Excellence in Teaching Award** (1998/1999).
- University of Waterloo **Co-op Supervisor of the Year**, finalist (Fall 1998)
- **Awarded research grants by the National Research Council** for several R&D projects including Distributed Processing Utilizing Proxy Servers for Controlling Processing Load Across Dynamic Resource Pools, and Multimedia Extensions for Authoring and Programming Languages (1994 - 1995)