

Senior leader with proven success achieving business objectives in rapidly changing environments. Expertise in driving operational efficiency, technology strategy and execution and talent recruitment and retention. Managed business growth initiatives for both a start-up and corporate organizations with experience in multiple industries. Possesses strong communication skills with an innate ability to connect, inspire and motivate staff, clients, partners, and executive boards. Experienced in driving digital transformation, product development, professional services consulting and guiding innovative technology to market through well-defined strategies with a focus on execution. Highly adept problem-solver with a history of leading critical areas and delivering commitments during adverse times.

Leadership Development & Utilization	P&L / Operational Management	Technology Planning and Execution
Strategic Consulting and Execution	Innovation & Product Development	Turnaround Engagements
Professional Services Consulting	Technology/Risk Assessments	Engineering Leadership
Digital Transformation	Organizational Design	Process Re/Engineering

Professional Experience

BMC SOFTWARE, INC. Houston, Texas *September 2022 – April 2024*

Strategic Advisory Consultant

Retained as a member of the North & South America's Customer Success Executive team. Responsible for driving digital transformation, effective software adoption and process improvement for strategic client accounts. Working with executives at multi-billion-dollar companies (Progressive Insurance, Lowe's Home Improvement, USAA Insurance, Walmart, Cox Communications) to create effective strategic roadmaps and tactical execution plans for SaaS software and digital adoption. Each engagement can be tailored to address a combination of projects, such as IT risk and security, digital workplace, operations management, service management, or multi-cloud management.

Major Responsibilities

- ✓ Assess and identify activities and deliverables that impact business value and assess each organization's ability to achieve its objectives.
 - ✓ Identify and/or confirm current pain points, business opportunities, and potential areas of transformation to create focused outcomes and future state.
 - ✓ Evaluate and prioritize the people, processes, technologies, and data required to support target client's business goals.
 - ✓ Develop and execute a long term, jointly defined success plan which includes strategic recommendations and a multi-phased roadmap that provides the guidance, capability requirements, and critical success factors necessary for transformation and adoption.
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SANDATA TECHNOLOGIES Long Island, New York *October 2021 – September 2022*

Vice President Product Software Engineering

Recruited as a key member of the leadership team, responsible for people, process, technology and innovation of the product software engineering function. Focused on the implementation of solutions that align with the overall technical vision and product strategy. Accountable to the board for digital transformation, innovation and re-engineering all products into sustainable SaaS solutions.

Major Responsibilities

- ✓ Member of executive leadership team responsible for guiding and developing long and short-term strategy.
- ✓ Provide leadership for global product engineering operation of over **120 technology professionals** while guiding the strategic direction.
- ✓ Responsible for driving innovation, both in current product mix as well as establishing innovation as a cultural value. Establish Proof of Concept (PoC) process for identifying, vetting and implementing solutions to meet the innovation value.

- ✓ Develop and implement a strategic plan to consolidate multiple offshore development partners into two cohesive offshore teams with savings of **\$4+ million** annually.
 - ✓ Responsible for IT strategic plan and measurement metrics via board of directors' approval:
 - Sourcing strategies relating to build vs. buy/lease on new technology investments, new application development and staffing augmentation.
 - Capital planning for short and long-range technology investments in hardware, software and staff.
 - ✓ Develop second-level engineering leadership team and succession plan.
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AMERISURE MUTUAL INSURANCE COMPANY Farmington Hills, Michigan **April 2019 – October 2021**

Director of Innovation

Retained to establish an operationally effective Digital Innovation (DI) practice. Drive organizational digital transformation via new capability platforms, emerging technologies, and practices. Using Proof-of-Concept (PoC), pilots and MVPs to bring new opportunities for revenue, efficiencies, and growth.

Major Responsibilities

- ✓ Operationalize the DI practice to move toward a more agile model that retains the innovation spirit and entrepreneurial excitement, while driving predictable outcomes, reducing rework, and aligning efforts with core IT systems.
- ✓ Grow and manage DI portfolio for corporate-assigned initiatives, mid-size projects and major-scale innovation efforts to ensure all initiatives are on track (budget, schedule and delivery timeline).
- ✓ Lead DI team, internal IT groups, business unit leaders and external partners (up to 34) to deliver on organizational commitments.
- ✓ Manage operational DI budget while funding innovation experiments and proving organizational value/ROI.
- ✓ Create a two-year plan for growing innovation throughout the organization and establish innovation as a cultural value.

Key Accomplishments

- ✓ Creation and implementation of DI 2.0, a full-cycle engagement model framework to guide and manage operational efforts to drive agile, entrepreneur-like execution while bringing order to the chaos of a fledgling innovation practice.
 - ✓ Expanded innovation throughout the organization, focusing on specific business units with a shared delivery approach. Created an innovation council comprised of upcoming and emerging leaders from each business unit to guide organic innovation efforts beyond the DI reach.
 - ✓ Grew the innovation portfolio and delivered a 47% increase in project completion via agile practices and standardization.
 - ✓ Scouted, engaged, and managed 34 outsourced vendor/partners.
 - ✓ As a contributing member of the internal Vendor Management Group, provided direction for establishing IT practices to ensure SOC 2 Type II controls were included in all new vendor selection and onboarding.
 - ✓ Managed DI budget to 97% utilization despite 2020 reductions in corporate funding.
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LEVELSET SOLUTIONS West Bloomfield, Michigan **June 2018 – June 2021**

President/Consultant

Successfully transitioned the business in 2017-2018 via sale of multiple software products LSS developed, now operating as a sole proprietorship offering consulting services focused on technology, business operations effectiveness and CIO leadership for companies from \$50 million to over \$1 billion.

LEVELSET SOLUTIONS Royal Oak, Michigan **March 2009 – June 2018**

President/CEO

Owner/founder of LevelSet Solutions (LSS), a professional services organization focused on custom technology and digital agency solutions. LSS delivered pragmatic technology, digital and management/process consultancy solutions with a concentration on software product development and technical, operational efficiency. With a focus on developing the right solution, not on a specific technology stack or digital packaged solution, LSS was known for its ability to solve business challenges while delivering on commitments.

Major Responsibilities

- ✓ Comprehensive responsibility for revenue, operational efficiency, and profit margins.
- ✓ Led and guided the recruitment for all talent including the hand-selecting and mentoring of the leadership team that successfully merged both experienced and young professionals into a cohesive high-functioning team.
- ✓ Managed all operations including technology, finance, human resources, technical and project management delivery teams, and sales/marketing.
- ✓ Led consulting practice focused on technology, business operations effectiveness and **CIO leadership services** to companies ranging from \$50 million to over \$1 billion.

Key Accomplishments

- ✓ Grew business to **over \$3.5 million annual revenue** exclusively on referrals and relationships.
- ✓ Led a team of **31** software engineers, solutions architects, technical analysts, digital project managers and digital marketing professionals achieving **double-digit, year over year growth**.
- ✓ Increased client base by **20%** annually through solid execution and commitment to schedule/budgetary guidelines while maintaining organizational profitability.
- ✓ Led technology and business product development for several software products developed for commercial sale/release.
- ✓ Delivered multiple custom financial applications requiring numerous integration points with three automotive OEMs, banking institutions (US & Canada) and third-party partners. Passed all required internal control reviews with increasing levels of cybersecurity.
- ✓ Provided leadership, strategy and guidance to multiple companies while engaged in “rescue efforts”. Assumed leadership responsibility and managed problematic technology departments, implementations and projects that were undergoing severe difficulty, resulting in a positive correction of technology delivery, operations, and strategy and/or business goals.
- ✓ Created a consulting practice on technology, management and business operations effectiveness, focused on assessments and crisis management as a separate business unit.

BUDCO, THE DIALOGUE COMPANY (became Dialog Direct, then Qualfon) Detroit, Michigan 1987 – 2008

Budco was a \$140 million privately held marketing, fulfillment and business process outsourcing firm working for Fortune 500 companies providing customized, technology-centric solutions to drive focused results and ROI improvements.

Chief Information Officer January 2005 – December 2008

Led the organization through multiple stages of growth during a formative shift in corporate strategy. From guiding technical architecture, client solution delivery, product development to corporate-wide process framework implementation. Managed internal operations and assisted company acquisitions and integration. Provided business development support necessary to drive significant year-over-year growth.

Major Responsibilities

- ✓ Member of executive leadership team responsible for guiding and developing long and short-term strategy.
- ✓ Provide leadership for IT operation of over **100 technology professionals** while guiding the strategic direction.
- ✓ Responsible for design and implementation of governance frameworks for technology and operational areas.
- ✓ Responsible for IT strategic plan and measurement metrics via board of directors’ approval:
 - Implement corporate governance frameworks for regulatory compliance (HIPAA, SOX, GLBA, etc.).
 - Performance measurement of IT infrastructure, systems, security, applications portfolio management.
 - Sourcing strategies relating to build vs. buy/lease on new technology investments, new application development and staffing augmentation.
 - Capital planning for short and long-range technology investments in hardware, software and staff.
- ✓ Developed IT leadership team of 12 and succession plan in conjunction with company objectives.

Key Accomplishments

- ✓ Created the *Budco Solutions Delivery Model*, a multi-year strategic framework of governance mapped to company goals, a cultural shift in the delivery of services to internal and external customers.
- ✓ Recognized market-driven need and led the organization to technology regulatory/legislative (SOX, HIPAA, GLBA) compliance via the SAS70 framework and CMMI Level3 certification.

- ✓ Performed major technical infrastructure transformation over 16 months while maintaining solutions delivery; created a highly available, stable, redundant, consistent technical infrastructure.
- ✓ Designed and led the creation of two innovative, market-driven, industry-specific products (healthcare, automotive). Both were operational and the most profitable revenue streams in company history for ten years.
- ✓ Transformed IT into a professional services organization (PSO) focused on customer/solution deliverables via integration, consolidation and elimination of non-core IT functions **increasing productivity and efficiency 25%.**
- ✓ Re-structured Software Engineering methodologies to provide cost-effective, extensible solutions aligned with rapidly changing market demands resulting in a reduction of **post-launch support by 38%.**
- ✓ Established an IT Professional Services Organization resulting in **year-over-year increases in billing percentages (37%) and gross margin (19%).**
- ✓ Instituted a performance-based metrics-driven approach to incentivize early completion and adherence to project specifications for all major supplier/partner business outsourcing development projects **increasing early-completion of projects under-budget by 30%.**
- ✓ Negotiated “shared opportunity” development programs for all outsourced enterprise software development projects **reducing overall spend by \$2 million** still delivering on-time, on-budget.
- ✓ Restructured corporate approach to Enterprise License Agreements (Oracle, Microsoft) for hardware, software suppliers **reducing annual maintenance spend by 15%.**

Director of IT Application Development, Infrastructure 2000 - 2005

- ✓ Led a team of 40+ professionals with overall responsibility for IT development, operations, servers, communications and network infrastructure.
- ✓ Designed, led and implemented the first successful offshore enterprise development effort.
- ✓ Directed and implemented full systems integration for near-shore Canadian partner enabling remote multiple fulfillment / distribution locations.
- ✓ Developed annual strategic plans for development resources including hiring, retention, and training.
- ✓ Responsible for guiding application development strategy, vision, and direction.
- ✓ Led research and implementation of an Oracle-based ERP solution, customized for unique market position.
- ✓ Led research, development, and implementation of custom/package Warehouse Management System (WMS) radiofrequency enabled, integrated with internal ERP and firmware for automated carousel.

Manager, Oracle Development/Oracle DBA/Senior Systems Analyst 1995 – 2000

Engineering Manager/Senior Technical Lead 1988 – 1995

Senior Engineer Analyst 1987 – 1988

RITE AID, INC., Pontiac MI 1985 – 1987

Software Engineer/Analyst

AMERICAN NATURAL RESOURCES (ANR), Detroit, MI 1984 – 1985

Software Engineer

Education

Northwood University, Bachelor of Business Administration, Business, Information Technology
Walsh College, Master of Science, Information Technology, Cybersecurity (2024)

Professional Affiliations

- Michigan Agile Enthusiasts (2009-2014)
- YMCA of Metropolitan Detroit Technology Advisory Committee (2007 – 2011)
- Budco Mentoring Program, Professional Mentor (1999 – 2008)
- Volunteer technology consultant for the YMCA of Metropolitan Detroit, Detroit, MI (1998 – 2000)
- Volunteer technology consultant for the St. Vincent, Sarah Fisher Center, Farmington Hills, MI (1996 – 1997)
- Henry Ford Health Systems, Technology Consultant (1996 – 1999)
- Detroit Oracle Users Group (DOUG), Detroit, MI (1995 – 2004)