

## Lawrence Hobbs CMC PMP

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## Summary

### A Trusted Advisor and Strategic Change Program Leader.

Lawrence Hobbs is a Certified Management Consultant (CMC since 2012) and a Project Management Professional (PMP since 1999). He is also certified as a Scrum Master and Prosci ADKAR Change Manager and has completed training in DevOps and Agile Project Management. A well-travelled and experienced generalist with an expansive knowledge base and a broad industry experience, he has led the design & implementation of many business, information technologies & systems projects as a strategic advisor (\$75M), delivery manager (\$20M), program manager (\$7M), product owner, project manager (\$10M+), senior change agent, business analyst, and departmental leader (60 FTE).

Lawrence is the author of “*Strategic DNA: Bringing Business Strategy to Life*”, a ‘How-to-Guide’ for the development and realization of projectized strategies and their benefits.

Originally an Air Traffic Engineer with Britain’s Civil Aviation Authority, Lawrence’s evolving career led him into engineering and IT roles throughout Bombardier Aerospace and IBM before he became a Balanced Scorecard and Project Management Office consultant with Renaissance Consulting and then an independent ‘generalist’ management consultant. His 40-year career has seen him working in Britain, Germany, Mexico, Colombia, the United States and throughout Canada. He now resides in Ottawa, Ontario.

Since moving to Ottawa in 2020, Lawrence has provided management consulting services to a variety of government departments and agencies on a contract basis.

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## Professional Experience

### BDO Consulting

**Roles:** Change Management, Performance Management, Business Planning and Business Analyst

**Duration:** February 2020 – April 2024

Performed management consulting roles with BDO’s government clients on short and long term contracts:

#### **Client: Employment and Social Development Canada (Ottawa)**

**Role:** Change Management Consultant (BDO Consulting Contract)

**Duration:** March 2024 – April 2024

Short, part-time engagement to develop a Change Management strategy, plan, and framework for the Program Operations Branch.

#### **Client: Public Services and Procurement Canada (Ottawa)**

**Role:** Management Consultant (BDO Consulting Contract)

**Duration:** October 2020 – June 2023

Facilitated strategic changes in IM/IT Client Executive Services processes and internal IM/IT Billing Processes. Overall, the role included providing facilitation, insight, advice and support, and developing, or facilitating the development of and recommendations for business processes, and the implementation of IM/IT and financial tools and technologies for management and executives of the Digital Services Branch and the Finance Branch.

The Client Executive Services engagement focused on reengineering the organization's processes to support transformation of its account management culture from being an "order taker" into a "client engagement and account manager". The CES organization coordinates the IT support of the many PSPC department's branches by managing relationships, facilitating hundreds of client requests and enabling client branch strategies. The work involved reframing and streamlining request intake processes, rearranging support functions and clarifying and adjusting roles and responsibilities. The role involved designing and building consensus for a workplan and then leading its implementation. This included facilitating workshops to clarify required improvements as well as the production and socialization of management presentations, process swim lanes, request templates, RACIs and related narratives and guidelines.

The Internal Billing Project supported the reengineering and future transformation of the Digital Services Branch's IM/IT internal billing processes respecting the expectations of the Treasury Board Policy for Service and Digital. Specific aspects included the development of IM/IT cost recovery estimating and forecasting tools, standards and processes, the mapping of as-is and to-be internal billing processes, the clarification of roles and responsibilities, the identification of change impacts, the planning and execution of individual and group consultations, the development of recommendations and executive presentations, etc. The project also included the development and executive presentation of recommendations in diverse areas including IM/IT Cost Recovery Billings, Account Executive roles, IM/IT Service Standards, Cloud Adoption, SAP migration implementation plans, etc.

Multiple additional tasks were supported on an ad-hoc basis primarily for the Financial Branch and Client Executive Services. These included development of draft recommendations and preparation of presentations in diverse subjects such as Cost Recovery Billings, Client Account Manager roles, OGD best practices, SAP migration project plans and BRD, cost recovery project forecasting, Shared Services BRD process, etc.

**Key Achievements:** Developed and implemented improved processes and tools for IM/IT Client Account Management processes and project cost estimating and forecasting processes. Overcame organizational resistance to change and frequent executive management changes. Improved change leaders' confidence.

**Products:** Assessments and Analyses, Recommendations, Workshops, Leadership and Workforce Briefings, Training Materials, Process Maps, RACIs and Swim Lanes, Templates, Procedures, Project Plans.

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## **Client: Office of the Superintendent of Financial Institutions (Ottawa)**

**Role:** Business Planning & Performance Management Consultant (BDO Consulting Contract)

**Duration:** October 2021 – May 2023

Facilitated the development two information systems business cases within the Cloud Adoption Program. The role included the development, socialization, and documentation of business cases for two strategic projects.

The Data Collection Modernization project was a joint undertaking by OSFI, the Bank of Canada and the Canada Deposit Insurance Corporation (the Tri-Agency). The work included the planning and facilitation of workshop consultations with leaders from Tri-Agency business and IM/IT organizations and resulted in the development of Outcomes Maps, Performance Information Profiles and Risk Registers per the Treasury Board Policy on Results and the authoring of business cases framed by the maps and profiles. The project is intended to modernize the data collection processes and technologies in line with the Treasury Board Policy on Service and Digital. It is particularly well oriented to reinforce the agencies' Cloud infrastructures. The business case presented broadly supported strategic recommendations for a transformational IM/IT investment to the CIO's and executive leadership of all three agencies.

The Case Management System Replacement project was intended to transform the processes and systems used by OSFI to manage applications for approval of new financial institutions, products, and transaction. The system to be replaced is 20 years old and its Cloud-based replacement will realign OSFI approvals processes with the Policy for Service and Digital. The work included the planning and facilitation of workshop consultations with business and IM/IT stakeholders and resulted in the development of Outcomes Maps and Performance Information Profiles per the Treasury Board Policy on Results and the authoring of business cases framed by the maps and profiles. The project was eventually postponed once the business case had been drafted.

**Key Achievements:** Facilitated team developing a \$75M Business Case for the modernization of the Tri-Agency Data Collection (and management) system. Built alignment and obtained support of Tri-Agency partners (OSFI, Bank of Canada and Canada Deposit Insurance Corporation) for the business case and its components. Ensured Treasury Board requirements and expectations were accommodated by the business case. Approval of Business Case by Tri-Agency executives.

**Products:** Business Case Document, Assessments and Analyses, Technical, Project & Change Management Strategies, Recommendations, Workshops, Leadership Briefings, Work Breakdown Structure and Master Schedule, Risk Assessments, Outcome Maps, Performance Information Profiles.

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**Client: Employment and Social Development Canada (Ottawa)**

**Role:** Performance Management Consultant (BDO Consulting Contract)

**Duration:** August 2022 – Mar 2023

Facilitated development of a results based strategic performance framework complete with Outcomes and Risks Map, Performance Information Profile and implementation supports. The project engaged leadership and subject matter experts from all regions of Canada in developing an aligned view of desired outcomes and metrics for the Integrity Operations organization. The work included interviews and workshops that resulted in several iterations of the outcome map and performance information profile to Treasury Board standards, the definition of requirements for reporting dashboards and the preparation of an implementation roadmap. The most challenging aspect of the work was obtaining the alignment of regional representatives from across Canada and between the Pensions and Employment Insurance domains.

**Key Achievements:** Developed a broadly supported (Canada-wide) results-based Strategic Performance Framework for the Integrity Operations Branch. Improved change leaders' confidence.

**Products:** Interviews and Analyses, Recommendations, Workshops, Leadership Briefings, Outcome and Risk Maps, Performance Information Profile, Reporting Dashboard Design, Implementation Plan Roadmap.

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**Client: Parliamentary Protection Service (Ottawa)**

**Role:** Performance Management Consultant (BDO Consulting Contract)

**Duration:** November 2021 – Mar 2022

Facilitated the development of a Strategic Performance Management Framework and an updated Strategic Plan. The role included the development of an environmental scan, the analysis of sectoral strategic and operational plans (including the development of an Outcomes Map), the realignment and clarification of the organizations corporate strategy, the development of a results-based management framework (including the development of a Performance Information Profile) and the design of an organizational performance measurement process.

**Key Achievements:** Developed a Strategic Performance Management Framework, an updated Strategic Plan, and an organizational performance measurement process.

**Products:** Interviews and Analyses, Environmental Scan, Recommendations, Workshops, Leadership Briefings, Outcome Map, Performance Information Profile, Risk Register, Implementation Plan Roadmap.

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**Client: Office of the Superintendent of Financial Institutions (Ottawa)**

**Role:** Organizational Management Consultant (BDO Consulting Contract)

**Duration:** February 2020 – August 2020

Facilitated the development and implementation plan for a new IM/IT Governance model. The role included the planning and execution of individual and group consultations and the development, socialization, documentation, and implementation planning for a recommended IM/IT Governance Model reconfigured to support OSFI's strategic objective of becoming a digital regulator. Working with the head of IM/IT Planning, tasks included the designing and recommending an overall scheme of governance

bodies and roles, their definition, validation with internal and external subject experts, swim lane process development, socialization with leadership and management, presentation preparation, and working/workshop meeting facilitation. The context for the model included the reinforcement of Treasury Board Policies on Service and Digital and on the Planning and Management of Investments, as well as Agile/Scrum, Cloud governance and ITIL/COBIT best practices.

**Key Achievements:** Developed recommendations and implementation plan for a new IM/IT Governance Model

**Products:** Interviews and Analyses, Recommendations, Workshops, Leadership Briefings, Draft Organization Chart and Role Definitions.

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## **Parkland Fuel Corporation (Red Deer, Calgary, Montreal, and Vancouver)**

**Roles:** Program Manager/Strategic Advisor (Long-term Contract)

Performed leadership roles in several complex multi-year IT initiatives for a rapidly growing corporation. These included:

- Strategic Advisor for the Parkland Way Business & Digital Transformation Program and for the IT PMO Project Portfolio Prioritization.
- Vendor Delivery Manager and Change Leader overseeing strategic partner delivery of \$20M Chevron and Ultramar Post-Acquisition IT Integrations.
- Project Executive/Program Manager for the \$7M JD Edwards ERP Modernization Pegasus Program and the Infosys CRM/ERP Technical Upgrade & Enterprise Stabilization.
- Program Manager for the Pioneer and Sparlings Post-Acquisition IT Integrations.

**Duration:** August 2014 – November 2019

These roles typically encompassed the entire program or project lifecycle from business case justification through project design & planning to system releases, data cutovers and organizational change implementation. They involved leadership advisory practices, oversight of procurement processes, assembling and managing teams of project managers, subject matter experts and vendors/partners, change management and formal business approvals, and overall responsibility for the design, scope, budget, schedule, and execution. The assignments involved budgets of up to \$20M and teams of up to 50 FTEs with an OCM impact on many hundreds of people.

**The Parkland Way Digital Transformation Program** to reset the company's Information Systems environments was conceived, developed, and launched during its first two phases with a budget of \$10M. Lawrence performed a thought leadership role as a Strategic Advisor alongside a Program Manager and an Enterprise Architect. This small team conceived and designed the program and then hired and managed consultants, development partners and project managers. Several foundational technologies were implemented and released during the second phase.

The design phase began with structured executive leadership interviews and facilitated workshops that permitted the team to identify the priority challenges and objectives, socialize the concepts and build alignment around a business case, program plan and system design (technologies and processes).

The second, foundational, phase implemented key technical platforms and their initial applications while utilizing a consistent, Agile yet formal project, release and change management framework. These initial objectives included implementing digital transformation platforms (MDM, IPaaS, BPMS), codifying and digitizing retail and refinery processes and procedures, streamlining the post-acquisition integration and fuel supply ordering processes, introducing Enterprise Financial Performance Measurement tools (OneStream) and Financial Consolidation processes, codifying post-acquisition change management practices, and designing the JDE ERP Cloud migration.

**The Pegasus Program**, to replace the company's JDE System and related integrated applications, is of particular note. At the time it was the company's largest ever IT initiative (\$7M) and was extremely sensitive, and high profile, considering its disastrous predecessor project six years previously. The program introduced DevOps principles, unprecedented professional rigour, and discipline to the risk management, configuration, testing, user community approval and release management, taking the company's SDLC practices to a new level of maturity. Pegasus was Parkland's first project that systematically managed and scheduled broad integrated systems releases, and proactively managed the effect of IT change on both the workforce and, crucially, the company's middle management and leadership. Lawrence's hybrid program manager/solutions integrator role built and nurtured the multidisciplinary team, owned the product backlog, and led the program while managing multiple

project managers and integrating their plans into release recommendations. Over its 2 year lifetime it achieved all its objectives and more, on time and on budget (98% of project budget).

**Change Management:** As the Program Delivery Manager for the Ultramar and Chevron Integrations Lawrence's role included scoping, justifying, and defining the change management team's statement of work then overseeing, coaching, and guiding their efforts and approving their impact/risk assessments and their change, training, and communication plans and deliverables. For the Pegasus Program and Parkland Way Transformation Program, Lawrence led consultative efforts that designed the strategy, scope, and objectives for, and wrote the charter for, the change and risk management plans. The program approaches were always framed to ensure collective ownership, thorough documentation, and broad, strong engagement.

For Ultramar, Chevron, and Parkland Way he then led the selection of specialist consultants and provided oversight and everyday guidance to their work. In both cases this involved leading the steering team and collaborating with external and internal specialists to consult and engage key stakeholders and the business; develop, validate, and approve the content embedded in their training and communication materials; and ensure timely and effective distribution of the materials. This approach ensured that the content, not merely the container, was of the highest quality. For Pegasus this work was performed by Lawrence and his internal project team without the use of specialized consultants.

In all cases the key was to facilitate the engaged collaboration and alignment of 'customers' and 'subject experts' – Risk Managers, Business Process SMEs, Systems Analysts, Trainers, Communicators, Leadership, etc. – while ensuring clear documentation (strategies, plans, roadmaps, visual aids, presentations, training materials and messaging) was validated and available to support the change program. This engagement and alignment were further reinforced by ongoing management of Subject Deliverable Matrices, Progress Reports, RACI (Roles) and RAID (Risks, Actions, Issues, Deliverables) to ensure visibility of progress and early intervention when performance gaps or risk events are emerging.

Lawrence was a project and change management pioneer at Parkland Fuels - sometimes against the resistance of senior leaders - demonstrating the value of systematic project and change management disciplines, advocating their inclusion in all IT projects and systems releases, and ensuring change management activities were embedded within all his projects and programs.

**Key Achievements:** The introduction of systematic change management for the workforce and, crucially, the company's middle management and executive leadership. Leadership and widespread adoption of a hybrid agile/waterfall/rolling wave approach. Design, implementation and utilization of structured systems releases, Replacement of the company's core ERP system, its technical infrastructure, and its many integrated applications. Modernization of the technical infrastructure and operational management practices for the company's core wholesale CRM system. Post-acquisition integration of major new acquisitions. Design & implementation of cutover plan with over 1000 MS Project lines that resulted in an "on-time" go live. Demonstration to Parkland leadership that it was possible for complex IT projects and programs to routinely navigate successful systems releases and deliver promised outcomes on time and on budget.

Other achievements include a major increase in organizational project management maturity, introduction and codification of an organizational change management culture, implementation of modern methods and technologies including Agile, PMI standards, MDM, IPaaS, release management, business resumption planning/testing, load testing, Business Process Management Systems, BizDevOps principles and IT PMO/Portfolio management, and procurement of integration partners for ERP system upgrades and the OneStream financial system.

**Products:** Business Cases, System Architecture Design, Project Charters, Leadership Workshops and Briefings, Scope Backlogs, Recruitment and Management of Self-actualizing Project Teams, Daily Team Stand-ups, Detailed Program and Project Plans and Schedules, Change Management Plans, IT Change Implementation Plans, Cutover and Release Plans, Disaster Recovery and Business Resumption Plans, Systems Test Plans, 650 Test Scripts and Automated Tests, Status/Progress Reports, Risk Registers, Issue Logs, and Corrective Action Plans.

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## **Chinook Solutions Inc. (Calgary)**

**Roles:** Owner/Management Consultant. Trusted advisor providing strategic planning, project, portfolio & change management services to 50+ clients across public, private, and non-profit sectors in Western Canada, Mexico, and Colombia

**Duration:** June 1999 – August 2014

Self-employed consultant and trusted advisor providing strategic planning, project, portfolio & change program management services to 50+ clients across public, private, and non-profit sectors in Western Canada, Mexico, and Colombia. A list of key projects is attached as an appendix. Clients included Alberta Education, Alberta Gaming & Liquor Commission, Farm Credit Canada, the City of Kelowna, the RCMP, Kelowna Airport, National Energy Board, Investment Saskatchewan, GNP Insurance, Landmark Homes, Western Feedlots, Manitoba Aboriginal and Northern Affairs, Sask Power and the City of Lethbridge.

### **Key Achievements:**

- Designed and led delivery of 100 project engagements.
- Developed Projectized Strategy Design and Implementation Methodology and codified it in the Strategic DNA book.
- Developed methodology for building clarity and alignment.
- Built alignment of boards, leadership & project teams, and industry collaborations
- Designed and led many board, executive, leadership, and staff level workshops to collect stakeholder opinions & insights, build alignment around problems and solutions, characterize readiness for change and develop understanding of impacts.
- Facilitated, advised, and coached senior leaders in development and implementation of visions, strategy maps/outcomes maps, strategic plans (including risk & change management) and implementation roadmaps, specific initiatives, strategy offices and project management offices.
- Developed and executed successful strategic, program, portfolio, project and change management plans and related presentations and workshops.
- Facilitated development of strategic project portfolios and their ongoing monitoring and formal reviews.
- Reengineered strategic change, portfolio, and project management processes.
- Assessed troubled projects and developed corrective action recommendations.
- Conducted strategic management and project management education and training classes for executives and project managers.
- Built project teams including hiring consultants and project managers.

**Products:** Strategy Maps, Performance Management Frameworks, Balanced Scorecards, Strategic Project Portfolios, Structured Interviews and Analyses, Leadership Workshops, Strategic Plan Documents, Change Management Plans, Risk Management Plans, Reengineered Processes, Recommendations and Reports, Education and Training Events.

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## **Earlier Roles**

### **Contract Balanced Scorecard & PMO Consultant at Renaissance (1999-2000 Mexico)**

- Implementation of Balanced Scorecard strategy design and performance management culture at Grupo Nacional Provincial and Grupo BAL.
- Development and implementation of strategic Project Management Offices and corporate Project Management methodology at Grupo Nacional Provincial and Grupo BAL.

### **Senior ITS Project & Solution Manager at IBM Global Services. (1997-1999 Calgary)**

- Program Manager to establish ICG Propane as an IT domain separate from the rest of Petro-Canada.
- Project Manager for multiple strategic & infrastructure IT Projects at Petro-Canada, TransCanada Pipelines, Nova Gas and ICG Propane.
- Development of projectized IT release management processes.
- Mentoring Account Executives, Project Managers & Technical Team Leads & Project Teams.

### **Manager of Business Systems & SDLC at Bombardier Regional Aircraft (1995-1997 Toronto)**

- Leadership, direction, mentoring and management of multiple project managers, technical personnel, and project teams. Management of \$28 million dollar budget & headcount of 60 FTE. Oversight of multiple \$1M+ projects. Transformation of IS operations.
- Responsibility for Conceptualization, Strategy, Requirements Definition, Software Development, Release Management, Acquisition, Training, and Implementation of Information Systems for complete division (\$5+ Billion revenue).
- Leadership of successful project for transformational new business processes at DeHavilland Aircraft providing a more responsive and cost-effective configuration management methodology for the Dash 8 family of aircraft.

### **Lean/Configuration Management Project Manager at Bombardier Learjet (1995-1995 Wichita)**

- Troubled aircraft program recovery project. Generated cost reduction of > \$20M and completed project in 50% of original timeframe and 40% of budget.

- Establishment, selection and leadership of multi-national 16 FTE engineering, manufacturing, and information systems team for the Learjet 45 consortium.
- Conceptualization and development of multi-national consortium joint data warehouse translating data in multiple databases in three countries into executive information at program headquarters.
- Methodology design, project definition, planning & execution of exceptionally aggressive \$1M+ project to recover lost BOM configuration and clean-up engineering documentation.

**Lean/Configuration Transformation Project Manager at Bombardier Canadair (1988-1995 Montreal)**

- Establishment, selection and leadership of 20 FTE joint engineering, manufacturing, and information systems team for bill-of-materials computerization.
- Performed key thought-leadership, product ownership and team leadership role in 5-year \$50M Business Process Re-Engineering initiative driving transformation of corporate culture and an innovation-driven gain in manufacturing effectiveness.
- Conceptualization, design, development and implementation of new approaches, organization, concepts, processes, and enterprise software tools for management of the aircraft life cycle from product concept to product retirement.
- Pioneered projects in leading-edge fields of Business Transformation, Integrated Manufacturing Systems, Design to Build, Concurrent Engineering, Total Quality, ISO 9000, and Enterprise Resource Planning.

**Technical Publications & Ergonomics Manager at Neotronics PLC (1985-87 Stansted UK)**

- Responsible for ergonomic design plus product documentation for the product development department of Britain’s leading hazardous gas measurement product manufacturer. Member of the seven-person team that won the highly prestigious Queens Award for Technology in 1987 for the innovative Exotox 50 Portable Multi-Hazard Gas Monitor.

**Electronics Engineer at Trio Kenwood GmbH (1984-1985 Frankfurt Germany)**

- Repair and calibration of radio-frequency telecommunications equipment.

**Electronic Engineer at Federal Electric (1983-1984 Frankfurt Germany)**

- Repair and calibration of U.S. Military electronics equipment.

**Air Traffic Engineer at Civil Aviation Authority (1979-1983 Heathrow/Rugby, UK)**

- Repair and calibration of radio navigation aids electronics equipment
- Maintenance, calibration and repair of airport radio navigation aids and telecommunication equipment

## Certifications and Awards

2024	<b>Scrum Master Certification</b>
2020	Government of Canada Secret Security Clearance
2019	Government of Canada Enhanced Reliability Security Clearance
2014	<b>Prosci® ADKAR Change Management Certification</b>
2011	<b>Certified Management Consultant (CMC)</b> , CMC-Canada
1999	<b>Project Management Professional (PMP)</b> , Project Management Institute
1990	Government of Canada NATO Secret Security Clearance
Earlier	Queens Award for Industry (Technology & Export), UK Government, NATS Air Traffic Engineer Certification, UK Civil Aviation Authority

## Ongoing Learning & Development

2024	Scrum Master Certification Course
2023	Introduction to DevOps (Foundations) Course
2022	Strategic Change by Design Course
2020	ISO 20700 Guidelines for Management Consultancy Services
2019	Quadrus Agile Project Management Course
2014	Prosci® ADKAR Change Management Certification Course
2010	Ethical Behaviour: Best Practices of Management Consultants
2003	Starting & Financing Technology Companies

Earlier Balanced Scorecard Strategy, PMI Project Management, IBM Front-Line Leadership, Structured Analysis, IBM Project Financial Management, IBM IT Problem Management, IBM IT Change Management, Project Risk Management.  
 TEC Diploma (Aerospace Communications & Electronics Engineering)  
 Radio Navigation & Telecommunications Engineering Certification (Air Traffic Engineering)

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## Publications & Selected Speaking Engagements

2024 **Author of Book.** Auto Biography: From Car Factories to Kars  
 2014 **Author of Workbook.** Do-it-yourself Business Planning Guidebook, Chinook Solutions  
 2008 **Author of Book.** “Strategic DNA; Bringing Business Strategy to Life”. Agate B2, Chicago  
 2002 **Author of Workbook.** A Q&A Assessment for Joint Venture Alliances. Chinook Solutions  
 2000 **Author of Workbook.** A Q&A Guidebook for Mergers & Acquisitions. Chinook Solutions

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## Demonstrated Skills

- Adaptability & Flexibility
- Advisory Services
- Alignment Building
- Analysis & Decision Making
- Balanced Scorecard
- Budgeting
- Business Analysis
- Business Cases
- Business Planning
- Business Process Improvement
- Change Management
- Change Leadership
- Communication
- Data Migration
- Detailed Cutover Planning
- Education & Training
- ERP Re-Platforming Project Management
- ERP Project Management
- Estimating & Forecasting
- Executive Coaching
- Facilitation
- Integration
- Issue Management
- IT Infrastructure Change
- IT Procurement
- Leadership
- Leadership Development
- Logic Modelling
- Management Consulting
- Mergers & Acquisitions
- Microsoft Office
- Microsoft Project
- Microsoft Visio
- Multi-agency alignment
- Organizational Development
- Outcome Mapping
- Performance Management
- Performance Information Profiles
- Post-Acquisition Integration
- Presentation Development
- Process Improvement
- Product Owner
- Program Management
- Progress/Status Reporting
- Project Costing
- Project Governance
- Project Management
- Project Management Offices
- Project Procurement
- Project Portfolio Management
- Radio Navigation
- RFI, RFP & Proposal Writing
- Requirements Definition
- Release Management
- Risk Management
- Scrum
- Software Development Lifecycle (SDLC)
- Solutions Integration
- Stakeholder Engagement
- Strategy Mapping
- Strategic Planning
- Strategy Implementation
- Team Building
- Team Leadership
- Transformation
- Vendor Delivery Management
- Workshop Facilitation

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## Project Portfolio (Summary)

Year	Client	Project/Engagement
2024	Employment and Social Development Canada (ESDC)	<ul style="list-style-type: none"> <li>• Program Operations Branch Change Management Strategy, Framework &amp; Plan</li> </ul>
2020/23	Public Services and Procurement Canada	<ul style="list-style-type: none"> <li>• Integrated Business Intake of IM/IT Request Process Improvement</li> <li>• IM/IT Internal Cost Recovery Process Improvement</li> <li>• IM/IT Sourcing and Vendor Performance Management</li> </ul>
2021/23	Office of the Superintendent of Financial Institutions	<ul style="list-style-type: none"> <li>• IM/IT Business Case for Data Collection Modernization</li> <li>• IM/IT Business Case for Case Management System Renewal (including Outcome Maps and Performance Information Profiles)</li> </ul>
2022/23	Employment and Social Development Canada (ESDC)	<ul style="list-style-type: none"> <li>• Integrity Operations Performance Management Framework</li> </ul>



Year	Client	Project/Engagement
2021/22	Parliamentary Protection Service	<ul style="list-style-type: none"> <li>Strategic Performance Management Framework (including Outcome Map and Performance Information Profile)</li> </ul>
2020	Office of the Superintendent of Financial Institutions	<ul style="list-style-type: none"> <li>IT Governance Review</li> </ul>
2014/19	Parkland Fuel Corporation	<ul style="list-style-type: none"> <li>IT PMO Project Portfolio Prioritization (FY2020)</li> <li>Business/Digital Integration Program (Odyssey/Parkland Way).</li> <li>Chevron Post Acquisition IT &amp; ERP Integration (Modelo).</li> <li>Ultramar Post Acquisition IT &amp; ERP Integration (Colt).</li> <li>JD Edwards ERP Modernization Program (Pegasus).</li> <li>Infosys CRM/ERP Technical Upgrade &amp; Stabilization.</li> <li>Pioneer &amp; Sparlings Post-Acquisition IT &amp; ERP Integrations.</li> </ul>
2010/14	Kelowna International Airport	<ul style="list-style-type: none"> <li>Vision Formulation &amp; Strategy Mapping.</li> <li>Project Governance Process Improvement.</li> <li>Project Prioritization Workshops &amp; Project Chartering</li> <li>IT Project/PMO Methods Review</li> </ul>
2010/13	Alberta Education	<ul style="list-style-type: none"> <li>Action on Business Planning.</li> <li>Funding Model Working Group Facilitation.</li> <li>Meta-Analysis of Cultural &amp; Workforce Themes</li> <li>Strategic Leadership Council Terms of Reference</li> </ul>
2009/13	Alberta Gaming & Liquor Commission	<ul style="list-style-type: none"> <li>Strategic Advisor &amp; facilitator for Performance Measurement &amp; Strategy Management Process Consultations.</li> <li>Corporate Initiative/Project Portfolio Design.</li> <li>Strategic Directions Trends &amp; Risk Review &amp; Analyses (x3).</li> <li>Balanced Scorecard Development (Progress measurement model).</li> <li>Board Reporting Framework Development.</li> <li>IST (IT) Strategy Design &amp; Principles Definition.</li> </ul>
2005/11	City of Kelowna	<ul style="list-style-type: none"> <li>Active Community Strategy – “Kickstart Kelowna”</li> <li>Strategic advisor and facilitator for Corporate Priority Planning.</li> <li>Corporate Project Portfolio Design &amp; Project Chartering.</li> <li>Developed “Kickstart Kelowna” Active Living Strategy</li> </ul>
2009/14	Landmark Homes Group	<ul style="list-style-type: none"> <li>Vision Formulation, Strategy Mapping &amp; Project Portfolio Design.</li> <li>Organizational Re-alignment Facilitation.</li> </ul>
2008/12	Farm Business Consultants	<ul style="list-style-type: none"> <li>Strategy Mapping &amp; Project Prioritization.</li> <li>Strategy Operationalization Process Design &amp; Facilitation.</li> </ul>
2004/08	Foothills Health Consultants	<ul style="list-style-type: none"> <li>Post-acquisition Vision Formulation and Strategy Clarification</li> <li>Strategic &amp; Operational Business Planning.</li> <li>Operational Business Process Modeling &amp; Re-Engineering.</li> </ul>
2007/08	Governments of Canada & Manitoba	<ul style="list-style-type: none"> <li>Formulation, alignment and planning of multi-agency Métis Economic Development Strategy</li> </ul>
2006/07	SaskPower Corporation	<ul style="list-style-type: none"> <li>Vision &amp; Strategy Clarification &amp; Mapping.</li> <li>Facilitation of strategy formulation and planning process.</li> </ul>
2006	National Energy Board	<ul style="list-style-type: none"> <li>Risk assessment of Document Management program.</li> </ul>
2006	City of Calgary	<ul style="list-style-type: none"> <li>Strategy Clarification &amp; Project Portfolio Prioritization.</li> <li>Strategic Advisor re Project Portfolio Management &amp; PMO.</li> </ul>
2006	City of Regina	<ul style="list-style-type: none"> <li>Project Management Training &amp; PMO Consultations</li> </ul>
2005	City of Kelowna	<ul style="list-style-type: none"> <li>Formulation of active community strategy.</li> <li>Alignment &amp; mobilization of community stakeholders.</li> </ul>
2005	BC Assessment	<ul style="list-style-type: none"> <li>Strategy Mapping</li> <li>Consultations on strategic alignment of information services</li> </ul>
2005	City of Kelowna Recreation	<ul style="list-style-type: none"> <li>Formulation of active community strategy</li> </ul>

Year	Client	Project/Engagement
2004/05	The Globe Theatre	<ul style="list-style-type: none"> <li>• Strategy Mapping &amp; Balanced Scorecard Strategic Planning.</li> </ul>
2004/05	RCMP	<ul style="list-style-type: none"> <li>• Project Management Training Program.</li> </ul>
2004/05	Regina Public Schools	<ul style="list-style-type: none"> <li>• Implementation of Balanced Scorecard strategy processes.</li> </ul>
2002/05	Farm Credit Canada	<ul style="list-style-type: none"> <li>• Strategy Clarification &amp; Mapping</li> <li>• Strategic Project Portfolio Prioritization</li> <li>• Organizational Change Management For IT Outsourcing</li> <li>• Consultations on strategic outsourcing of IT service delivery</li> <li>• Consultations on project culture development</li> </ul>
2002/03	City of Lethbridge Utilities	<ul style="list-style-type: none"> <li>• Research of best practices in Performance Management for Utilities</li> <li>• Development of performance standards and performance management processes for Outsourced Utility Service Delivery</li> </ul>
Earlier Projects	GNP Insurance (Mexico)	<ul style="list-style-type: none"> <li>• Troubled Program Assessment of SAP Transformation Program</li> <li>• Strategic Advisor for introduction of Corporate Project Management Office (PMO) for Balanced Scorecard implementation.</li> </ul>
	Petro-Canada/ICG Propane	<ul style="list-style-type: none"> <li>• Program Manager for separation of IT domains (corporate divestiture)</li> </ul>
	Bombardier Learjet	<ul style="list-style-type: none"> <li>• Project Manager for troubled aircraft program recovery project. Assembled multi-national team. \$20M per annum savings.</li> </ul>
	Bombardier Canadair	<ul style="list-style-type: none"> <li>• Project Manager, aircraft bills-of-materials automation. \$25M budget.</li> <li>• Key leader in 5-year Lean Transformation and ERP Implementation</li> </ul>