

IT Strategy & Value ♦ Workflow Automation ♦ Reporting Tools ♦ Data Migration/Integration ♦ Productivity  
Leadership ♦ New Media/Social Media Marketing ♦ Written & Verbal Communications

**Jargonless Technology Professional** - understandable implementation that focuses on business results. Greater productivity, tools for revenue production or dramatic time-savings and error reduction. I won't do technology to you.

I am a **former CIO** and business owner with strong communication skills and business process knowledge. I do not resell any product (hardware or software) and will objectively assess your requirements and ensure you don't over or under use current and new technology.

Additionally, I am a published author – with a book to my credit and numerous articles, tutorials, marketing copy projects, sales and customer service letters, and handbooks to my credit. Need an engaging e-newsletter, I can create it quickly.

Finally, I provide onsite and remote training for office applications. Two hours of training and occasional remote follow up and coaching can result in hours each week of streamlined operations and far fewer errors.

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## Professional Qualifications/Skills

- Virtual-CIO/Technology Consultation & Management
  - Strategic Planning, Vendor Selection & Management
- Project Development / Project Management
  - *Project leadership, resource allocation, and team leadership.*
  - *MS Project, Microsoft Visio flow diagrams*
  - *Workflow analysis, requirement gathering and documentation*
- Microsoft Excel Automation (reporting, analysis, and decision support systems)
- Social Media (blog, podcast, social media)
  - Wordpress setup, customization, and training.
  - Video editing, audio prep, content planning and writing
- Strong business acumen, understanding of financial, sales systems, and operations – ability to proactively understand and communicate with company leadership.
- Training: Technology and Operational Excellence
- Application Development (desktop & web)
  - *Advanced VBA (Microsoft Access integration with Word, Excel, and multiple back-end database systems), Visual-basic, Active Server Pages.*
  - *Document Assembly Applications using MS Office*
  - *Reporting Systems – Crystal Reports, Excel automation, ASP, and ASP.NET*
  - *Microsoft SQL Server*
- Network Design & Implementation
- Windows Operating System Support:
  - *2003, XP, 2000, NT, '9x*
  - *Active Directory, DNS*
- Remote Access/Remote Office Solutions
  - *VPN/Remote Desktop – Citrix and Thin-client computing.*

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## Clients – Industries & Projects

### Various Small Business Clients – 2005 - Present

- CRM evaluation, building sales tools and commissioning spreadsheets and analysis tools using Microsoft Access VBA, SQL Server, Filemaker Pro data, Excel, and Microsoft Access as a front-end to reporting tool.
- Assisted Sales & Marketing Directors in the creation of a corporate blog programs, training subject matter experts on content creation and management.
- Provided workflow analysis, virtual-CIO services, vendor management, and system design and rollouts planning and implementation.

### Cambridge Properties - Phoenix, AZ – Real Estate – Mid 2007 - Present

- Provide complete technology and business workflow analysis, technical direction, and training for management and staff.
- Created complex sales commissioning system and lot and property tracking system. Created web-tools for user access to commission data.
- Created VBA based Access front-end to SQL Server data for rapid reporting and built tool for rapid creation of spreadsheets from a searchable query screen.
- Worked with company controller to create numerous spreadsheets for development profitability analysis – using Excel and shared – networked data – for cross company sharing and collaboration.

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**Venicom, Inc. (Scottsdale, AZ) – Telecommunications – February 2005 – January 2007**

- Working with COO, served as virtual-CIO, providing complete technical project direction, vendor management, analysis and assessment of existing technologies, and project designs for all technical implementations.
- Created documentation, workflow analysis and project specs, and training on all implemented technologies – including management of outsourced development team.
- Planned, designed, and built a business tracking application using Microsoft Access, VBA, and SQL Server database. Includes Access to XML/Web Services Integration, Tools to import partner orders from remote MySQL database, Partner Web Site for live order processing, and customer service, auto-email assembly and distribution.
- Built a variety of sales & tracking tools using Excel to pull data from a variety of online and internal data systems.
- Created a sales tracking tool that integrated data gathered in spreadsheets by nationally dispersed sales team and automated the collection and aggregation of that data.
- Designed and implemented upgraded network infrastructure, Windows 2003, VPN, and remote office integration with Terminal Server.
- Various online tools for remote partner management, e-commerce system, consolidated management reporting tools.

**Waste Management (Phoenix, AZ) – Refuse/Collections Division – October 2004 – March 2005**

- Developed project guidelines, technical specifications, and infrastructure design for various technology projects.
- Prototyped Microsoft Access to SQL Server application for call tracking, distribution, and reporting system using VBA and custom SQL functions, data schema design and documentation, and implementation and upgrade planning.

**Maracay Homes (Scottsdale, AZ) – Homebuilder – January 2004 – June 2007**

- Working with all levels of company management, provided complete technical project design, planning, management and implementation.
- Provided management & user presentations, presenting Visio workflow diagrams, MS Project plans, and Powerpoint.
- Implemented internal web-based discussion forums and corporate intranet for their “seamless team” company project discussions.
- Built custom desktop applications for configuration deployment, document assembly and report distribution using Microsoft Access – VBA, SQL Server, and ASP.NET for a web-based management reporting console.
- Created web-based reporting and customer service relationship tools using asp and asp.net, communicating with custom SQL Server database and their corporate building management system (FAST).
- Designed, built, and deployed Windows 2003, Exchange 2003, SQL Server, Terminal Services environment.
- Provided full migration planning, vendor analysis, and purchasing to move company from NT 4.0 domain to a Windows 2003, Exchange 2003, Terminal Server/thin-client architecture.
- Provided tools for remote access and remote office connectivity through VPN, Blackberry Enterprise Server integration, and advanced Exchange scripting for shared calendar applications.

**SOHO Resource Group (Scottsdale, AZ) – Insurance/Employee Benefits – November 2002 – August 2004**

- Provided overall technical direction, network and desktop support, marketing consultation and web application development.
- Created standards and documentation for multi-vendor integrated systems and financial and payroll reporting systems.
- Built several web .asp projects using MS SQL Server 2000, .asp, and Microsoft Access. Built internal client tracking system using Microsoft Access and SQL Server.
- Created internal tracking system using MS Access forms, VBA, & SQL Server.
- Created all financial tools and reporting systems – for internal management and investors.

**Southland Title (Burbank, CA) – Mortgage\Title – Client work dating back to 1997 – 2003**

- Project Design & Management, Citrix integration, Access Development.
- Built highly modular logon scripts using VBScript & Xixtart – automating all aspects of desktop configuration & application deployment.
- Built several multi-backend database integration, analysis, and reporting tools using Access VBA & SQL Server

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**Latham & Watkins (Los Angeles, CA) – International Law Firm – various between 1995 – 2000**

- Desktop application development using Microsoft Access, VBA & Visual Basic.
- Built Real-Estate practice ownership transfer system using Microsoft Access – taking multiple sources of data and building automated transfer documents & language database based on geographic and property information.

**Blue Cross of California (Woodland Hills, CA) – Health Insurance – 1988 – 1995**

- Desktop application development using Clipper, Microsoft Access VBA & Visual Basic.
- Built their large group Evidence of Coverage document assembly system in MS Access with integration to MS Word. System incorporated complex language library and data tracking – automating the creation of client insurance contracts and associated rider.
- The system produces a savings of more than \$300,000 in printing cost in the first 9 months and increased productivity by 400%. Contract Analyst went from producing 1.2 contracts daily to more than 4.5 contracts daily.
- Provided all workflow analysis, requirements documentation, project planning, and resource scheduling for several multi-department technology projects.
- Created and delivered training and online documentation for both technical project details and user interface.

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**Other Clients/Employers**

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|----------------------------|------------------------------------|---------------------|
| • Latham & Watkins         | • Primerica Financial/Smith Barney | • HealthNet         |
| • Northrop Grumman         | • Sebastian International          | • Lavi Industries   |
| • Remo Drums               | • Tamrac                           | • The Debt Solution |
| • Learning Tree University | • Power-one                        | • DSSI              |

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**Publications & Presentations**

- Authored ***The IT Career Builder's Toolkit: The Complete Guide To Building Your Technology Career In Any Economy*** (Cisco Press –released 2005) ;
  - **Published in InformIT – Universal Logon Scripts, Career and Professional Development;**
  - Published in Power Media's – California, Colorado, Texas, & Illinois Technology Magazines; Including: *Why Technologists Must Learn To Speak Business*
  - Published in Wall Street Journal's Career Journal – Boundaries and Benefits of Working At Home;
  - **Published in Windows Scripting Solutions – WAN Aware Logon Scripts;**
  - Quoted and interviewed for MSNBC's Career Column, Eweek, Midrange Systems Magazine, Network Magazine, TechRepublic, Project Management Networking Magazine, Network World, The Arizona Republic, and others;
  - Keynote: McDonald's I/S Career Conference;
  - Keynote: Prentice Hall IT Symposiums (20+ presentations between 2005-2008);
  - Keynote: Project Management Institute: (Concept Over Process – steps to project value and success);
  - Presented on Scripting Automation and Citrix System Design at PC Expo/TechXNY – Manhattan;
  - Presented on New Media, Blogging, Podcasting, Marketing, and Professional Development for ASTD, Society for Technical Communications, Society for Information Management, Senator Byron Dorgan's Great Plains Technology Conference, Smith Barney/Primerica, and many others.
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