

Roelf Woldring

416-427-1567 roelf@roelfwoldring.com

Contract Program / Project Manager with Business Transformation Experience

Available for program and large project management contract assignments in IT, business transformation, and post-merger integrations.

PROGRAM AND PROJECT MANAGEMENT EXPERIENCE

Organized by Client

RSA IT PROCESS IMPROVEMENT PROGRAM

1. Upgraded RSA Canada's Application Development / Maintenance Process to include State of the Art Agile Methodology

- Initiated a project to upgrade the existing SDLC methodology to include agile approaches.
- Oversaw the execution of this project, building consensus on the specific implementation chosen by the application development / maintenance management team.
- Managed the specific implementation plans, including tool acquisition research, change management activities, and skill upgrade plans.
- Implemented a "tooling inventory" process which identified over 200 software programs which had been acquired over the past 10 years to support the application development, operations and architecture activities. Created a rational approach to limiting / retiring/ upgrading this tool set.

2. Upgraded RSA Canada's working relationship with RSA's main operations outsource vendor.

- Initiated negotiations with the vendor's senior management to restructure and to adequately resource the vendor service delivery team so that negotiated upgrades and changes were delivered on time.
- Initiated a regular vendor performance management process for RSA's in-house team responsible for working with this vendor.
- The service delivery upgrades would result in 10's of millions of dollars in annual savings in IT operations out-source costs.
- Initiated and oversaw the internal change management communication with RSA's business stakeholders to appropriately involve them in testing the new arrangements.
- Ensured that there was no loss of service delivery quality to the business's day-to-day operations because of these vendor changes.

3. Managed a service review of the performance of RSA's main off-shore application development/maintenance staff provider.

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- Oversaw the creation of a first ever database of which off-shore vendor staff were assigned to which RSA application development / maintenance activities across Canada.
 - Educated RSA's application development management team in a consistent method of rating the "work in progress" performance of these off-shore vendor individuals.
 - Consolidated the information on the off-shore vendor's service delivery ratings.
 - Briefed the IT management team on the consequences of the vendor's less than stellar service delivery.
 - Opened negotiations with off-shore vendor's management team to correct this situation.
4. **Managed the "work in-progress" performance rating of all RSA Operations, Application Development, and Architecture full time / contract staff.**
- Developed and extended a "who is doing what" current assignment database which added RSA's contractors to the list of RSA's full time IT staff for the first time, resulting in a first ever accurate picture of RSA's IT full time equivalent head count.
 - Developed and implemented an update process for adding "current work assignment" information so that each individual could be accurately linked to their current project / work assignments.
 - Educated the IT operations, application development, and architecture management team in a "current assignment / current project" performance rating system that clarified the "work in progress" contribution of these individuals.
 - Oversaw the staff review needed to identify the full time and contract individuals who would be let go during the summer of 2016 to reduce RSA's Canada IT head count to the numbers mandated by the RSA's UK Head Office.
5. **Initiated the project to implement an operating departmental level financial management process for IT Operations, Application Development, and Architecture for 2017.**
- Assessed the impact of current state of the IT financial management process, which attempted to managed over \$100 million dollars of annual operating spend across IT with a single sheet budget of the operations of these groups.
 - Engaged / educated the operating level managers in IT architecture, application development and operations on the need to have department level annual operating budgets and tactical plans that could be compared against actual spend.
 - Started the process of developing these operating budgets for 2017. Implement the processes needed to link them to and integrate them into RSA's general financial management process. Choose and implement the software tools to support this activity.

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Eigenworks Business Intelligence

- 1. Managed competitive business intelligence projects for several large software vendor clients.**
 - Created the project plans for doing these projects.
 - Reviewed the plans with and have them approved by senior client representatives.
 - Managed these projects to time and expenditure targets.
 - Conducted the interviews with operating executives (CFOs, CIOs, CMOs, CEOs) to uncover the in-depth reasons underlying their software purchase (or non-purchase) decisions of these clients' software offering.
 - Analyzed and consolidated the interview reports to develop insights into what the clients could do to improve their software offerings, their sales processes, and their client relationship management activities.
 - Made presentations to client senior management teams.
 - Facilitated "so what" discussions with these executive teams to develop strategic actions to improve their sales success in the marketplace.
 - Analyzed the strategic implications of these client projects for improving Eigenworks' future business with these existing and new potential clients.

HR Medic

- 1. Managed the development of tactics for the post-merger integration of 3 Ontario profession regulatory agencies.**
 - Worked with the executive of a regulatory agency to project manage the post-merger integration of 3 agencies regulating the accounting profession in Ontario.
 - Managed the analysis of the processes and the data stores used by each of the 3 agencies to identify commonalities and differences. Develop and communicate a work flow and data integration strategy.

Woldring Consulting Associates

- 1. Delivered a project management and disaster management conceptual framework for a "seismic event" disaster response program for a provincial health care organization.**

Chicken Farmers of Ontario

- 1. Managed the successful negotiation of the Ontario farm gate price for chicken over a 2-year period.**
 - Managed the negotiation process with the organization representing chicken processors in Ontario for the farm gate price of Ontario chicken over a 2-year period.
 - Engaged and directed legal counsel to take the negotiation through legal arbitration to a win in the second year.

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- Won in both years, adding over 10% each year to the annual income of chicken farmers in Ontario (approximately 1500 farms, over \$600,000,000 dollars annually of chicken production at the farm level).

2. **Managed the development and the implementation of a response to a potential avian influenza outbreak on an Ontario poultry farm.**

- Managed the development of a coordinated “farm first level” response to an outbreak of avian influenza on an Ontario poultry farm, ensuring that the virus involved did not spread to other Ontario farms.
- Ran training, publicity management, and farm level simulation events to train a team of “first responders”, incorporating staff from all 3 Ontario Poultry regulatory boards.
- Managed the collaboration with the Canadian Food Inspection Agency and the other Ontario Poultry Regulatory Boards to stage a simulated avian influenza outbreak on an Ontario egg layer farm.
- Used the simulation to begin the process of building the working relationships needed between staff from the federal /provincial government and the Ontario Poultry Regulatory Boards which ensure a rapid and successful response in the event of an actual outbreak.

Manulife Financial

1. **Created and ran the Y2K change management process which coordinated the introduction of several thousand needed changes into the Operations production environment between 1 April 1999 and 15 November 1999.**

- Created and communicated the IT wide change management process for Y2k, incorporating appropriate elements from the application development and operations management change management processes.
- Managed the administration of the Y2K change log.
- Ran the weekly Y2K Change management meetings.
- Resolved any conflicts between the VP’s competing groups, ensuring that all required changes were appropriately scheduled.
- Managed the shutdown of changes to the production environment on November 15.
- Transitioned the Y2K change management process back to normal change management procedures during January 2000.

2. **Managed the integration of Manulife’s disparate Canadian e-commerce development groups into a centralized function as of 1 April 1999.**

- Inventoried all e-commerce related software development / maintenance/ production management activities done by the various Canadian IT organizations.
- Identified the staff associated with those activities.

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- Negotiated the transfer of this staff to the new E-commerce Development / Production Management organization.
 - Transferred the staff and the software assets they managed.
 - Developed and implemented an appropriate management structure for the new organization.
 - Initiated performance management discussions and contracts with the individuals in these management roles.
3. **Upgraded Manulife E-commerce software development, client engagement and production work flow to use “best in class” agile practices.**
- Initiated and directed the research needed to identify the “best in class” practices used in North America for e-commerce software development and production management.
 - Oversaw the translation of this research into an integrated e-commerce workflow, which contained the following components.
 - Engagement,
by which development / operations work was scoped, estimated and described in project charters and first level service level agreements that were signed off on by business clients.
A release schedule which identified the functional elements to be included in each release was part of this process.
 - Development,
by which e-commerce software was built and tested.
Agile practices such as time-boxing / sprints, user co-location, pair programming, write tests then code, daily builds, were incorporated into this work flow.
 - Transaction Processing Application Coordination,
by which the e-commerce software development projects were linked to the work on the mainframe and server based in-production applications they accessed and supported.
Timing interdependencies were identified and taken into account.
 - Production Management,
by which the e-commerce software releases were deployed into the Operations e-commerce production environment in a way that managed their interactions with mainframe and server based applications to which they were linked.
Constant monitoring of the e-commerce applications “in production”, as well as the implementation of consistent software architecture practices such as “e-commerce application response time and volume growth self-monitoring / reporting”, allowed the e-commerce production management team to ensure service level response time and availability levels.
 - Oversaw the delivery of e-commerce services using this work flow.
In a 24-month period, the e-commerce group completed 144 projects on time and budget using these processes.

4. Managed the “work in progress” current performance and future potential evaluation of 1200 Canadian full time IT professionals.

- Performance appraisals had NOT been completed for this staff for the past 5 years.
- Developed the process needed to complete the facilitated manager peer groups meetings in which the current performance and future delivery potential ratings of these 1200 IT professionals (up to and including the Director level) were agreed to dialogue among groups of relevant superiors. Document the results of this dialogue.
- Facilitated the 6 all day workshops in these evaluations were completed by over 75 participating IT departmental and resource managers.
- Managed the outplacement follow-up program, which led to the outplacement of over 200 low performer/ low potential employees in a 3-month period.
- Managed the staff transition and succession planning follow-up program, which addressed career and professional development planning for low performance / high potential, high performance / low potential, and high performance / high potential individuals.
- Coordinated the process by which the results of this evaluation where tied to the bonuses paid to staff in that calendar year.

5. Managed the development of an Ontario focused IT salary survey process and implemented its consequences.

- Oversaw the development of an IT salary survey process at a time when there were no IT focused salary surveys in Ontario, and implement it.
- Managed the development of an adjustment program which brought internal IT salaries and IT contractor rates in line with industry standards.
- Communicated the results to over 1500 IT professionals.

6. Implemented a consistent resource manager approach to talent management in a 1500-person IT organization.

- Developed the operational framework for separating out talent management and development accountabilities from the role of IT departmental / project managers. Negotiated the implementation of the new framework with Corporate HR.
- Staffed the “resource manager” group across 3 Canadian IT organizations.
- Oversaw the new process by which IT professionals where assigned to department and projects through dialogue among resource managers and department / project managers.
- Clarified that IT resource managers were responsible for the quality and adequacy of the IT talent pool while IT departmental / project managers were responsible for IT service delivery in the annual performance management process.

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7. Managed the hiring of 600 IT professionals as contractors in a 3-month period in response to Y2K transition work load peak.

- Created a “recruiting” web site for hiring IT professionals at Manulife before job boards such as Workopolis existed.
- Rolled out a training program for the contractor hiring and performance management process for the IT staff management involved.
- Managed the development and rollout of an approach that ensured that Revenue Canada could not deem these individuals as employees at a time when Manulife was under Revenue Canada pressure to deem its insurance brokers as employees.

WORKPLACE COMPETENCE INTERNATIONAL

For a student transportation client

1. Developed a new performance management process for this organization.

- Based it on the organization’s implementation of a new model of decision making.
 - Local decision-making authority for day-to-day customer service quality and local operational issues in over 70 North American locations.
 - Head office decision-making authority over one-off business issues, standardized work flows, asset purchase and deployment, automation of business processes, and talent management.

2. Developed a future staffing head count model which predicted anticipated head count over 70 North American locations based on several different business scenarios

3. Developed a business architecture and decision authority framework for the future of the organization.

- Clarified the potential results of implementing a new model of organizational decision-making through dialogue with VP-HR, the Executive VP – Operations and the CEO.
- Coordinated the change team dialogue which expanded this new model into concrete operating models for all the aspect of the organization – service delivery, marketing, customer relationship management, asset acquisition / maintenance, financial management, and talent management.

4. Structured the cultural change communication program for informing 15,000 North American staff about the elements of this major business transformation.

- Included e-learning based approaches for economically extending this change management communication to staff in over 70 North American locations.

For clients in the North America using Meta's Software IDEF business process modeling tool

5. Managed the turn-around of multiple failing business process re-engineering projects, getting the projects back on track and focused on delivering results.
Business environments included:

- The commercial mortgage side business of a major American financing organization.
- A California based saving bank.
- The logistics command of the US Air Force.
- An oil and gas consortium building a sea based oil pumping platform.
- A major engineering and construction firm, specializing in the design and construction of complex industrial and power generation complexes.

For a major Canadian Banking Organization

1. Program managed the IT process re-engineering group, which completed process modeling projects necessary for re-engineering the following banking activities.

- This bank's side of inter-bank clearing process.
- The monthly general ledger / financial statement closing process, across the bank and all its subsidiaries, reducing the time needed to close the monthly books from 45 to 15 working days.
- Branch operations, evaluating the possibility of implementing a "branch of future" decentralized IT operating model.

2. Consulted with the new turn around CIO on the future organizational design of IT and on the performance metrics needed to turn around the service delivery of this IT organization.

For 2 major Canadian Banking Organizations

Developed an upgrade to the workflow, operational processes and performance metrics of 2 Canadian Banks' IT Project Office Management offices;

- Integrated the PMO activities more appropriately with those of each Bank's Enterprise Architecture group.

For a federal government agency supporting Canadian exporters

1. Acted as the IT turn around advisor and IT process upgrade program manager.

- Worked with the existing IT management team to implement needed improvements to the application development and operations management work

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flows, increasing its 9 to 5 national reliability performance metric to the high 90%'s.

- Acted as the recruiting process manager on the hiring of a new CIO.

For a major Ontario Automobile Parts Manufacturer

1. **Managed an IT business, application and technology platform architecture project which linked the IT strategy to the business strategy of this organization for the first time.**

TransCanada PipeLines

1. **Led the turn around the IT organization.**

- 9 to 5 service availability was less than 80% at the start; 99% 1 year later.
- The project management process consisted of assigning application development work to individual programmers at the start. One year later, application development was done in teams using a project management methodology.
- Over the next years, IT service levels increased substantially, while IT unit operating costs decreased annually.

2. **Managed the projects needed to introduce and to implement needed IT workflows.**

- IT C-level steering committee and governance process.
- IT departmental budgeting and financial management.
- IT asset inventory tracking and management.
- IT Talent management: hiring, promotion, performance management, termination, and contractor management.
- IT capacity planning and Technical Services
- An IT application development methodology.
- An IT project management methodology and office.
- An IT operations production management / service level agreement process.
- An IT chargeback method and process.
- An IT Information Centre methodology and process.
- An IT architecture process, aligning the year over year IT application architecture and technology platform strategy to the business strategy.

3. **Program managed the project managers delivering 2 new mission-critical applications to the organization.**

- A custom built general ledger, meeting TCPL's need for enhanced proactive internal financial management, as well as it's needs to report elements of its internal financials to 4 different national, provincial and state regulatory authorities, which monitored TCPL's cost of service and rate base, each using a different code of accounts.

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- An electronic-approval based purchasing management application, which dramatically decreased the time needed to include new assets and material purchased for pipeline expansion in TCPL's regulatory agency monitored "rate of return" rate base, thereby increasing TCPL's bottom line.
- 4. Re-negotiated the IT asset acquisition contracts with TPCL's IT vendors.**
 - Decreased the annual cost by over 50%.
 - Ensured that these IT assets were now included in TPCL's regulatory agency approved rate base, generating a Rate of Return on them for the first time.
 - 5. Managed the project for signing hundreds of legal contracts in a matter of weeks, needed to move TPCL's financing of "take or pay of gas" arrangements with Alberta gas producers off balance-sheet.**
 - Ensured the completion of the signing of hundreds of legal contracts in a cascading series of step in a matter of weeks.
 - 6. Managed the development, the testing, and the implementation of business disaster recovery program for the entire business as well as IT.**
 - Based the disaster recovery approach on the assumption that many of the TPCL executive and IT management team members were no longer available, as required by external contracts with Banks and financing organizations.
 - Negotiated the provision of off-site mainframe and personal computer facilities with a disaster backup organization in Ontario and Alberta.
 - Integrated disaster recovery steps into IT's normal day to day operating processes in across the country.
 - Integrated "regularly scheduled" testing of IT's disaster recovery capability as part of normal IT operations.
 - Ran "simulated" business wide disasters to educate TPCL's non-IT business professionals about the changes they needed to make to their day-to-day business work flow to be able to recover from the loss of their normal business environments.
 - Managed the "audit" of IT day-to-day operations and TPCL's disaster recovery capability by 40 external IT auditors from the Banking Institutions involved in the re-financing of TPCL's "gas purchase take or pay" contracts.
 - 7. Integrated a number of IT organizations acquired as a result of TPCL's acquisition of other companies.**

CAREER HISTORY

Chief Technology Officer

February 2016 - July 2016

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| RSA Canada | (Interim Contract) |
| <i>Senior Consultant / Operations Leader</i> Eigenworks | April 2015 – Feb 2016 |
| <i>Executive Lead</i> HR Medic | Dec. 2013 – Dec. 2014 |
| <i>Senior Associate</i> Woldring Consulting Associates | Jan. 2012 – Dec. 2014 |
| <i>General Manager</i> Chicken Farmers of Ontario | Aug. 2005 – April 2007 (Interim Contract) |
| <i>Vice-President</i> Development Services (E-Commerce) and IT Architecture Manulife Financial | April 1999 – June 2001 |
| <i>Vice-President</i> People & Process Manulife Financial | Oct. 1997 – March 1999 (Interim Contract) |
| <i>Principal</i> Workplace Competence International | May 2007 – Dec. 2014 July 2001 - July 2005 June 1986 - March 1997 |
| <i>Director</i> Corporate Information Systems TransCanada Pipelines | Feb. 1981 – May 1986 |

EDUCATION & CERTIFICATIONS

Advanced Postgraduate Diploma in Management Consultancy
Doctor of Business Administration program (All but dissertation)
Henley Management College, Henley-on-Thames, England.

Ph.D, Organization Theory and Behavior (All but dissertation - MBA plus equivalent)
School of Business Administration, University of Massachusetts, Amherst
(All but dissertation - MBA plus equivalent)

2 years of additional undergraduate study
Organizational Psychology and Applied Social Science, Concordia University, Montreal

B.A., Philosophy and Sociology
Sir George Williams University (now Concordia University), Montreal

Alternate Dispute Resolution: Mediation and Negotiation Skills , ADR Institute of Ontario

Certification, Myers-Briggs Step II Instrument

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Certification, Hay-McBer Golemann EQI Emotional Maturity Instrument

Practitioner: Society of Neuro-Linguistic Programming, Toronto

Graduate, Group Facilitation Trainer Development Program
Centre for Human Relations and Community Studies, Concordia University, Montreal.