

CAREER SUMMARY

A fluently bilingual senior business professional with over twenty years experience. A seasoned public speaker and a sharp negotiator with highly developed analytical abilities, sound judgment, exceptional management and people instincts, well-developed business acumen, and very strong communication skills. A results-oriented leader who excels in motivating teams to meet their full potential. Managed Client Services for a growth-oriented and fast-paced business by cultivating excellent relationships with financial institution KDMs. A Change Manager who has consistently implemented large and complex projects successfully. Expertise in executing change and in using technology and innovation to drive business value.

CORE COMPETENCIES

- Client Services
- Change Management
- Business Implementation
- Relationship Management
- Contract Negotiation
- Vendor Management
- Using technology to drive business value
- Effective Communication
- Motivating Teams
- Leadership
- People Management

KEY CAREER ACHIEVEMENTS

- Managed the largest client at Brookfield RPS with the client moving from a point of frustration to one of satisfaction, with the client subsequently increasing volume with Brookfield and adopting a new product that resulted in a significant new revenue source.
- Led the implementation of a transformative change to how Brookfield assigns appraisals, leading to reduced turn times and reduced jobs that are declined.
- Drove a major change that resulted in 98% of appraisal reports being uploaded using a new software program that included a quality review, resulting in superior reports for the client, reductions in reports that included errors, and declines in calls to the company's contact centre.
- Executed a fundamental multi-year project at Royal & SunAlliance leading to 250,000 transactions that were previously processed manually instead being directly processed on an online portal, leading to better customer experience and major cost savings.

PROFESSIONAL EXPERIENCE

BROOKFIELD REAL PROPERTY SERVICES (BRPS), BROOKFIELD ASSET MANAGEMENT, Toronto, ON

2007 - 2014

Director, Business Implementation

2007 - 2014

Led the implementation of large projects, and onboarded new clients.

- Acted as the Account Executive for all new clients during the onboarding stage, until the client was successfully implemented and all issues were resolved. Successfully onboarded major clients including BMO, HSBC, ATB, Banque Laurentienne, CMHC, and CitiFinancial, ensuring that these clients representing tens of millions of dollars of revenue were successfully brought into our systems.
- Drove change in the organization including significant improvements to our client-facing portal for ordering appraisals, and the implementation of new processes to improve the client experience, producing a competitive advantage in the market for BRPS.
- Produced significant cost savings and superior appraisal reports for the client by implementing a new appraisal software program that included a quality review prior to reports being uploaded. Onboarded the entire BRPS appraisal network in a six-month project, ultimately leading to over 98% of appraisals being uploaded using this software program.
- Generated a 20% decrease in jobs declined by appraisers and in the turn times to complete appraisals by successfully leading a major year-long effort to develop and implement a more accurate assignment engine.
- Collaborated with Toronto Dominion Bank on the development of a new automated product that summarizes the characteristics of an appraised property that are not consistent with the bank's underwriting criteria, resulting in TD purchasing this product which was highly profitable for BRPS. The product is now sold to nearly all of our major clients (BMO, ATB, BNC, HSBC) and is the highest margin product for the company.
- Managed vendors including negotiating contractual terms, identifying key milestones, and ensuring we met timelines in a major project to move our client facing portals to Salesforce platforms (three separate vendors managed simultaneously).

Director, Client Services

2007 - 2008; 2008 - 2011

Managed KDMs at large banks, ensuring they were satisfied, that any unique requirements they had were addressed, and that they were retained as clients at contract renewal time.

- Led the Client Services sales team that solved problems and ensured satisfaction from major clients and Key Decision Makers at financial institutions including TDCT, CIBC, BMO, ING, Manulife, Banque Laurentienne, RBC, BNC, CitiFinancial, and Alberta Treasury Branch (ATB). All of these clients were retained and renewed contracts with BRPS without exception.
- Appointed as Account manager for the company's largest client, TDCT, and moved the client from a point of frustration to one of satisfaction by developing and delivering on a plan to improve service levels. TDCT subsequently increased its volume with BRPS by over 20%.
- Successfully renewed every client on all contract renewals, with no exceptions, while increasing overall margin.
- Designated as point person in the development of a new product that most major clients subsequently purchased, leading to a very profitable new revenue stream for BRPS.

ROYAL & SUNALLIANCE INSURANCE COMPANY OF CANADA, Toronto, ON

2003 - 2006

WebBusiness Leader

Led a transformative change that moved 250,000 transactions annually from manual entry at R&SA to direct entry by brokers.

- Drove changes through R&SA that resulted in major cost savings, by effectively leading a team of 20 business professionals responsible for strategically identifying opportunities for online investments, and then subsequently implementing new solutions and new online assets for the company.
- Moved WebBusiness, a multi-million dollar investment, from being another sales channel to becoming the dominant business model in the company for processing business. Brokers eventually placed 85% of their insurance transactions with R&SA through this Web portal, representing over 250,000 transactions a year that used to be processed manually. This resulted in significant productivity improvements and reduced costs in the company, and led to customer service improvements for Brokers.
- Led the team that managed the decisioning and rating engine which was responsible for rating, billing, client documentation, and other business-critical functionality. Drove changes to the engine that led to more accurate results, reducing revenue leakage, lowering manual rework, and improving the customer experience.
- Designated as point person on multiple other projects that solved critical problems for the company and successfully managed and influenced a cross-functional team assembled to address company problems.

RYERSON UNIVERSITY, Toronto, ON

2001 - 2003

Lecturer, "The Concepts of eBusiness"

- Taught a course at Ryerson University (School of Information Technology Management, Faculty of Business) on "The Concepts of eBusiness" which "provides students with an understanding of current trends in the evolution of the "Digital Economy"" – contract renewed five consecutive terms.

MCGRAW-HILL RYERSON, Whitby, ON

2002

E-Content Manager (Contract Position)

- Managed a team of professionals in the Media Technology Department (Higher Education Division) with budget, organizational, and planning responsibilities.
- Liaised with sales, information technology, marketing, and editorial teams to develop the strategy for online assets at a time of transformative change for publishing companies, resulting in valuable new online assets for the company.

PRIOR PROFESSIONAL EXPERIENCE

BANK OF MONTREAL

Strategist, E-Business Division

- Recommended new investments in online assets to executives including in some cases the Chairman and Vice Chairs--championed change within the bank so that the organization could be a web-leader.

Special Assignment

- Seconded by the Chairman of Bank of Montreal, Matthew Barrett, to produce a confidential report on the attempted merger between Bank of Montreal and the Royal Bank. Interviewed the top thirty decision makers and the key legal, accounting, and consulting partners to produce a detailed analysis that summarized the key strategic lessons from the effort.

Senior Manager, Strategy and Planning, Electronic Financial Services

- Responsible for strategic, tactical, and business planning issues--developed the three year plan for mbanx and represented mbanx as a public speaker. mbanx was the first online bank in North America.

Issues and Research Analyst, Chairman's Office

- Interpreted social, political, economic, and technological developments and how these could impact on the bank--produced strategic reviews of the bank's most important initiatives.

FOREIGN AFFAIRS AND INTERNATIONAL TRADE CANADA

Special Advisor, Trade Policy, NAFTA Negotiation Office

- Provided advice on issues related to the NAFTA negotiations and represented the Federal Government as a speaker on NAFTA.

CANADIAN CHAMBER OF COMMERCE

Director, International Policy

- Dealt with all aspects of the international policy process for Canada's largest business association; had ongoing interaction with senior executives of Canadian companies.

EDUCATION

Master of Arts (International Affairs) **Norman Paterson School of International Affairs, Carleton University** **1990**
(Concentration in Management, International Political Economy Stream)

- Research essay topic: "The Dispute Settlement Mechanisms of the Canada-United States Free Trade Agreement: A Game-Theoretic Analysis"
- Oral defense passed with distinction
- Awards: Ontario Graduate Scholarship (twice), Dean of Graduate Studies Scholarship

Master of Social Sciences (Political Science) **University of Western Ontario** **1990**

- Thesis Topic: "Cooperation Despite Anarchy: A Counterintuitive Analysis of the Nuclear Relationship Between the United States and the Soviet Union"
- Awards: Ontario Graduate Scholarship, Special University Scholarship

Bachelor of Arts (Honours Economics) **McGill University** **1987**

- McConnell Memorial Bursary
- Awards: Scarlet Key awarded by McGill University President in 1987 for having "demonstrated exceptional leadership and initiative in extracurricular activities"

Diplôme des études collégiales (Social Sciences) **1982**

- Dean's List
- Participant, Forum for Young Canadians
- President, Debating Union

PROFESSIONAL DEVELOPMENT

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| CrestCom Management Training | 2011 - 2012 |
| <ul style="list-style-type: none">▪ Twelve full day sessions, over the course of a year, on all facets of management. | |
| Six Sigma Green Belt | 2007 |
| <ul style="list-style-type: none">▪ Development of Six Sigma competency. | |
| Post-Merger Integration, Conference Board of the United States | 2006 |
| <ul style="list-style-type: none">▪ Conference on how to successfully implement a merger or acquisition. | |
| Advanced Executive Program, Bank of Montreal, Kellogg Business School | 1998 |
| <ul style="list-style-type: none">▪ Three week course on how to be a more effective leader. | |
| Financial Analysis, Johnson School of Business, Cornell University | 1997 |
| <ul style="list-style-type: none">▪ One week course on the key financial concepts in business. | |
| Strategic Implementation, Wharton School, University of Pennsylvania | 1997 |
| <ul style="list-style-type: none">▪ One week course on the strategies to effectively make change happen and stick. | |

SELECTED VOLUNTEER ACTIVITIES

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| Canadian International Council | 2010 - Present |
| Board of Directors (2010 start—four year term) | |
| <ul style="list-style-type: none">▪ Elected in 2010 to sit on the National Board of the Canadian International Council, chaired by Jim Balsillie, former co-CEO Research in Motion (2010 - 2013), and by Bill Graham, former Minister of Foreign Affairs, Government of Canada (2013 -). | |
| Canadian International Council (Toronto Branch) | 2001 - Present |
| Board of Directors (2001 -) | |
| President (2004 - 2009) | |
| <ul style="list-style-type: none">▪ Elected in 2001 to sit on the Board of the Canadian International Council (at the time called the Canadian Institute of International Affairs). Elected to be President in 2004, and continued until 2009. | |
| United Way of Greater Toronto | 2002 - 2009 |
| Operations and Technology Committee of the Board of Directors | |
| <ul style="list-style-type: none">▪ Member of an advisory Committee of the Board of Directors. The Committee provided strategic operations advice to the Board. | |
| Club Canadien | 1995 - 2011 |
| Board of Directors (1995 - 2011) | |
| President (2002 - 2003) | |
| <ul style="list-style-type: none">▪ Member of the Board of Directors. The Club organizes French-language speakers in support of promoting French-language activities in Toronto.▪ Served as President in 2002 - 2003 and had the highest average participation at our luncheons of the previous ten years. | |