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PROFESSIONAL PROFILE

A diverse business background centered on Project Management, Information Technology and Business Consulting. Results oriented with proven abilities to take on multiple projects and business issues while maintaining strong client relationships and leadership. Business minded with an applied technology background and collaborative leadership style.

PMI certified in Project Management as well as a Masters Certificate from York University. Change Management certification through Prosci.

CAREER HISTORY

West Coast Approach Consulting

August 2016 to Present

West Coast Approach is an Organization Development company that partners with its clients to support their change progress toward their vision. It is in the business of helping leaders build inspired workplaces focused on achieving better outcomes in performance and people practices.

Title: Project and Change Management Consultant

Work with clients to establish plans based on best practices in both project and change management for a particular project or as it relates to Project Management and/or Change Management Office initiatives.

UNIT4 Business Software

September 2009 to May 2016

UNIT4 Business Software is a provider of ERP and Accounting Software across a broad range of industries from non-profit / NGO and higher education to public and private sector organizations.

Title: Senior Project Manager

Manage new implementation and upgrade projects of UNIT4 ERP. Responsible for the overall project plan development, budget development, project status tracking, resource management as well as client relationship management and project change management. Duration of project is

typically between 10 – 16 months. New implementation budget average \$1.5M US or more. Manage 3-5 projects at any one time. Awarded the Global PM or the Year award in 2012.

Projects:

Harvard Law School - Cambridge MA Sept 2009 – July 2014 Implement Agresso Education in a Phased approach

King County Housing Authority - Seattle WA June 2010 - April 2011 Implement Agresso ERP all modules

US Travel - Anchorage AL 2011 - Oct 2012 Implement Agresso Central Command for Travel

Canadian Partnership against Cancer - Toronto ON - Feb 2012 - March 2013 Implement Agresso ERP all modules

International Civil Aviation Organization - Montreal Quebec - June 2012 – Dec 2014

Implement custom Travel Authorization and Payment Dispatch modules globally

Dec 2013 – Dec 2014 full upgrade of Agresso ERP

Conservation International – Arlington VA - July 2012 – July 2014 Implement Agresso ERP all modules for global organization

ACL – Vancouver BC – June 2014 – August 2015 Implement Agresso ERP all Finance modules

TRIUMF Labs – Vancouver BC – July 2013 – January 2016 Implement Agresso ERP all modules including inventory and commitment accounting.

Havas Marketing – New York, New York – Oct 2014 – Feb 2016 Implement Agresso ERP all modules

Sunshine Coast Regional District – Sechelt, BC – June 2015 – May 2016 Implement Agresso ERP all modules

MaryKnoll Fathers and Brothers – Ossing, New York – Oct 2015 – May 2016 Implement Agresso ERP all modules

Institute for Community Living – New York, New York – Jan 2016 – May 2016 Implement Agresso ERP all modules

Awarded the UNIT4 Global Project Manager of the Year award in 2012

VanCity – Inventure Solutions

February 2008 to August 2009

Inventure Solutions Inc. is a BC-based Canadian company, created in April 2001, as the information technology subsidiary of Vancouver City Savings Credit Union (VanCity), providing technology solutions to the Vancity Group, as well as services to other credit unions and other affiliated financial services companies. Their mission is to provide technology leadership and innovation enabling customers to achieve their business goals. Inventure Solutions Inc. provides system operations, maintenance, development, project management and technology consultancy skills.

Title: Project Manager - CDI & Customer Portal Implementation (July 2008 – July 2009)

Project Manager for the implementation of an Enterprise Customer Data Integration solution and the supporting portal within the Vancity Group. Project budget set at \$5.5m with a 12-month timeline. Key components of the project include the development of an SDLC within a Service Oriented Architecture environment, procurement and vendor management with CDI Vendor, Initiate Systems, as well as the key CDI consulting firm, Baseline Consulting and other

individual contractors supporting development and QA activities. Implementation of project governance standards that support a project of this size and complexity for management of communications, change, procurement, vendor relations, budget, schedule and scope.

Title: PM - CDI & Portal Business Case (Feb 2008 – June 2008)

Led the Business Case development phase of the Enterprise Customer Data Integration (CDI) project. Schedule and conduct interviews across all business areas within the Vancity Group to gain a better understanding of the business challenges to support its strategic plans as well as the day to day operations in relation to inconsistent and incorrect customer information. Budget for the business case was \$500k. The case was developed on budget and on schedule presented to the Executive Leadership team of Vancity with approval to proceed to project. Estimated budget for this project was set at \$5.5m.

KLR Consulting Inc.

April 2006 to January 2008

KLR was a leader in providing project management, business analysis and management consulting services to its clients. Established in 1989 and sold in 2008, KLR's project management offerings included: managing projects; providing project resources; implementing / operating project management offices; establishing project portfolio management; training; and implementing enterprise-wide project management tools.

Insurance Corporation of British Columbia (ICBC) (May 2007 to September 2007)

Managing Consultant to the manager of the IS Contact Center and e-Business Services (CCeBS) department at ICBC. Consulted on all e-Business related projects including the replacement of the Enterprise Search Tool, implementation of Sun Identity Manager within the corporation and the replacement of ICBC.com with a Portal Content management solution. Primary focus was on ensuring CCeBS was resourced and trained to effectively takeover sustainment of the products implemented from a support aspect. Key project management methods were introduced within the department in accordance with the newly implemented IS project management methodology.

Gov't of BC - Accommodation and Real Estate Services (June 2006 to April 2007)

Lead consultant on program to implement a project management methodology within the Development Services department of ARES who oversee all building development work with a portfolio of approximately \$500m for the BC Gov't and other authorities. The methodology contained standard project management areas including charter development, communication planning, risk management, quality management, status reporting and project closure as well as construction related areas pertaining to environment and procurement delivery method selection.

Working for the Director of Development Services and with 8 Development Managers successfully implemented the methodology over the course of this assignment ensuring all

projects undertaken were managed utilizing the methodology and associated templates through an established Projects Office.

Vancouver Organizing Committee (VANOC) (April 2006 to June 2006)

Produce and implement venue development project management procedures for the Venue Development Division. Working with the Manager of Venue Projects documented detailed procedures for Venue Project Managers to follow. Procedures for status reporting, site meetings and minutes, document control, change orders, cost forecasting and invoice payment control were developed and implemented.

HSBC Banking Corp.

November 2004 to April 2006

HSBC Bank Canada, a subsidiary of HSBC Holdings plc, has more than 9,500 offices in 79 countries and territories and assets of US\$1,034 billion, the HSBC Group is one of the world's largest banking and financial services organizations.

Title: Manager Projects - Business Systems

Manage project management within the Branch, Direct and eBusiness banking IT division, utilizing a Risk Based Project Management methodology and Niku enterprise project management tool. Established a project office to manage project governance for all projects in this area.

- **Management:** Manage five project managers along with the overall direction, monitoring and assignment of all projects. Projects in progress average 15 – 25, with annual completion estimated to be between 30 – 40 projects.
 - **Program Management:** Managed the Truncation and Electronic Cheque Printing (TECP) program within IT for HSBC. This was a Canadian wide Financial Institution initiative which will see all cheques imaged by 2007 thus eliminating paper cheque exchanges between all banks in Canada. This program oversees 12 direct and 13 indirectly related projects mostly dealing with application upgrades to support this program.
 - **Project Management:** - Managed 2 projects within the TECP program to archive all cheques for HSBC and develop a retrieval mechanism for both branch and ebusiness channels.
 - **Project Management Community of Practice –** Responsible for the initiation of this COP with on-going membership responsibilities.
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CAYENTA Canada Corp.

August 2001 to October 2004

A subsidiary of the Harris Computing based in Ottawa, Ontario, Canada, Harris is a leading provider of CIS Billing and Finance management software solutions since 1976, with annual sales of \$20M US in 2003.

Based in Vancouver, Cayenta Canada provides a suite of revenue cycle management software and services for municipal and co-operatives markets, including regulated and de-regulated public utilities.

Title: Project Manager

Manage new implementation projects of Cayenta's Utilities CIS Package. Responsible for the overall project plan development, budget development, project status tracking, resource management as well as client relationship management and project change management. Project manager is involved in shortlist presentations helping secure the contact. Duration of project typically between 10 – 16 months. New implementation budget average \$2M US or more. Manage 1-2 new implementations at any one time.

- Winston-Salem, North Carolina – Completed Sept 2002
- Maryville, Tennessee

Manage multiple Cayenta Financials, Operations Management System and Utilities CIS package upgrades. Primary responsibilities include development of project charter, scope statement, project schedule, budget management, status reporting, issues resolution and client transition to customer support. Duration of project typically between 4 and 6 months. Average upgrade project implementation budget is \$300,000 US. Manage an average of 3-4 upgrade projects at any given time.

- Oakville, Ontario – Implemented May 2003
 - Port Coquitlam, BC – Implemented Sept 2003
 - Yakima County, Washington – Implemented Sept 2003
 - Lakeland, Florida – Implemented March 2004
 - Waukegan, Illinois – Implemented January 2005
 - Fairfield, California
 - San Jose, California
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CLARICA LIFE INSURANCE

Nov 1997 - April 2001

Clarica, now a Sun Life company is headquartered in Waterloo, Ontario, and has offered Life Insurance and Financial Solutions throughout Canada for over 100 years. Sun Life is a Tier 1 Insurance company with sales of \$10B annually.

Title: Business Consultant - Project Management: (Jan 1999 - April 2001)

A senior member of the Shared Business Services Group operating out of the Financial Services Division. Provided specialized consulting and contract services in project management solutions and business process re-design.

- **Project: Royal Trust (RT) Pension Acquisition**
 - Role: Project Manager
 - Budget: \$28M
 - Sponsor: President Canadian Operations & Vice President – Pensions Division
 - Stakeholders: Customer Service, Sales & Marketing, Finance. IT, RT Pension Executive, Legal, Communications, Human Resources, Corporate Audit, Corporate Mergers/Acquisitions

Successfully co-led the due diligence and planning phases to acquire and merge the Royal Trust pension business into Clarica. Primary mandate was to ensure project management methodology was adhered to and used through both phases.

- **Project: Group Life & Health Insurance Re-Organization:**
 - Role: Project Manager
 - Budget: \$500,000
 - Sponsor: Executive Vice President – Group Insurance
 - Stakeholders: Sales & Marketing, Account Management, Customer Services, IT, Finance, H/R

Managed overall project office and project managers assigned to this initiative. The overall re-organization objective was met, which was to downsize the workforce of 350 staff by 25% within 6 months. This was accomplished through redesign and implementation of business processes within the 3 divisions of sales & marketing, account management and customer service. It was organized as 3 sub-projects with the project managers reporting to the Project Office. The Project Office was responsible for providing project management methodology and support as well as monitoring status.

- **Project: Group Disability Insurance Re-Organization:**
 - Role: Project Management Consultant
 - Budget: \$100,000
 - Sponsor: Vice President – Group Disability Insurance
 - Stakeholders: Customer Service, Account Management, Claims Management

Project management consulting role through project initiation and planning stages. Worked with assigned project leader to establish project plan and schedule and ensure project methodology was adopted for project execution phase.

- **Project: Corporate Branding Program – Building Entrance Project**
 - Role: Project Manager
 - Budget: \$1M

- Sponsor: Vice President – Marketing, Vice President – Shared Business Services
- Stakeholders: Retail Insurance, Group Insurance, Savings & Retirement, Investments, H/R, I/T, Corporate Marketing, Corporate Branding Team

Represented Clarica as lead project manager and owners' representative, overseeing \$1M re-design and renovation of its head office entrance and atrium to support re-branding and name change of the company. Project involved gathering requirements from all stakeholders, transforming requirements to fit into fixed budget and ensure look and experience represented new brand and name guidelines. Managed all phases of project including, requirements gathering, design development, construction and closure. Managed outsource selection of prime consultant.

- **Project: Shared Business Services – Project Management Office (PMO) Project**

- Role: Project Manager
- Budget – N/A
- Sponsor – Vice President Shared Business Services
- Stakeholders – Document Services, Purchasing, Communication Services, Legal Services, Document Services, Facility Services, Employee Services

Project management responsibilities for design, implementation and management of the shared business service's project management office. Coordination with all stakeholder area directors and management to design, and implement a PMO to advise, provide project consulting and selection methodology as well as monitor department project status.

Title: Technical Solutions Consultant- Project Management: (Nov 1997 - Jan 1999)

A senior role primarily focused on I/T solutions for the Savings and Retirement division. As one of team of several senior project managers', worked with this business area to ensure projects selected were managed and implemented on time and within budget.

- **Project: Mutual Investment Portfolio (MIP) Implementation**
 - Role: Project Manager
 - Budget – N/A
 - Sponsor – I/T Director Saving & Retirement Division (S&R)
 - Stakeholders – S&R Administration, S&R I/T, S&R Sales & Marketing

Managed project to retrofit the group savings pension system to support a new product line. The project involved all the standard system development life cycle phases working with business analysts, quality assurance, I/T designers and developers (approx. 40 people). Strict project timelines were met to ensure product was delivered in time for RRSP/ RRIF seasons.

- **Project: Saving & Retirement I/T Re-organization**

- Role: Co-Project Manager
- Budget – N/A
- Sponsor – IT Director Savings & Retirement (S&R I/T)
- Stakeholders: S&R Administration, S&R I/T, HR

Successfully co-managed project to re-organize S&R I/T division to align with the S&R business division. This impacted approximately 150 staff members. It involved merging business analyst's and quality assurance staff from the business area into I/T and re-organizing the I/T area to match up with the various functions and products in the S&R business area.

- **Project: S&R I/T Project Management Community of Practice (COP)**
 - Role – Program Coordinator
 - Budget – N/A
 - Sponsor – IT Director Savings & Retirements
 - Stakeholders – S&R I/T

Coordinated the implementation of a project management COP with the group retirement services IT area. This involved bringing together all project managers from this area and establishing mission, vision, goals and objectives for the COP. Conducted bi-weekly meetings and coordinated special discussion groups on various project management topics relevant to the group and its needs.

J.M. SCHNEIDER INC. 1982 – 1997

A subsidiary of Maple Leaf Foods, Schneider's has sold quality meat and other food products for over 100 years in Canada. With operation and distribution facilities across Canada, Schneider's head office is located in Kitchener, Ontario. Annual sales is approximately \$1B.

Title: Manager - I/T Application services: (1996 – 1997)

A member of the I/S management team coordinating all software application support and software development projects for the corporation. Responsible for the department budget of \$1M annually and twelve application developers.

- **Business Enabler Strategic Forum (BESF)**
 - Role – Coordinator / Facilitator/ Program Manager
 - Budget – N/A
 - Sponsor – Director Information Technology
 - Stakeholders – Finance, Sales & Marketing, Operations, Operations Services, Distribution Services, Research & Development

Coordinate the BESF semi-annually which involved business case preparation for all potential corporate IT projects, facilitating the project selection forum and on a continual basis managing the PMO for the projects selected and initiated.

Title: Internal Auditor: (1994 – 1996)

As a member of the Corporate Internal Audit department, was given the opportunity and freedom to review a cross section of the business areas by conducting audits and delivering a risk assessment program.

- **Control Self-Assessment Program Implementation**
 - Role: Implementation Consultant
 - Budget – N/A
 - Sponsor – Corporate Audit Committee
 - Stakeholders – Finance, Sales, Marketing, Operations, Operations Services, Distribution, I/T, H/R

Coordinated delivery of risk assessment program throughout all divisions and subsidiaries of J.M. Schneider Inc. Implementation involved risk training, conducting work sessions to establish and document risks and risk management program in each department.

- **Warehouse Management System Implementation Project**
 - Role – Auditor
 - Budget - \$2M
 - Sponsor – Vice President Finance
 - Stakeholders – Distribution, Customers, Sales, Finance, Operations, I/T

Provided audit services to warehouse management software package implementation project. Primarily auditing project implementation practices and project management approach.

Title: Project Manager / Systems Analyst / Developer: (1982 – 1994)

Starting as an Intermediate mainframe PL/1 developer, primarily shared support and development project responsibilities for all manufacturing related software. Software included plant production scheduling, material in-process tracking and inventory, yield analysis, purchasing, and preventive plant maintenance systems.

- **Logistics Information System Project (LIS)**
 - Role – Project Manager
 - Budget - \$2M
 - Sponsor – Director Production Logistics
 - Stakeholders – Logistics, Finance, Operations, Operations Services, I/T, Sales

The objective of this project was to design a system to track product and product yield through the production process and support a new “Activity Based Costing” technique that was being introduced simultaneously. Managed this project which involved 75 people on various sub-projects to address product scheduling, material tracking, and production yield tracking and costing. Coordinated PMO to ensure all sub projects status was reviewed weekly and issues were resolved. The development of these systems was done using rapid application

development and prototyping techniques with the creation of a simulated object oriented database within the limitations of the technologies used. All development work was done in house with company development staff.

- **Hardware Replacement Project(s)**
 - Role – Project Leader
 - Budget - \$1M
 - Sponsor – Director Information Technology
 - Stakeholders – I/T, Operations, Finance, Sales, Distribution, Operations Services, H/R

Managed projects to replace Schneider's hardware from Honeywell DPS6 mini computers to NCR Adds mini computers in 1989 and then again from NCR Adds to H/P in 1993. Involved managing the testing of all company applications including parallel, unit and volume stress testing. Coordinated all implementation cutovers for all applications.

- **Time & Attendance Implementation**
 - Role: IT Project Manager
 - Budget - \$1M
 - Sponsor – Vice President Finance & Administration
 - Stakeholders – Payroll, H/R, Operations, I/T

Manage all IT aspects of implementation of 3rd party vendor solution to track labor time within the operations division. This was a significant change moving from manual time cards to an electronic clock and monitoring system feeding the payroll system.

- **Plant Maintenance System Implementation**
 - Role – Project Manager, Lead Systems Developer
 - Budget - \$100K
 - Sponsor – Director Plant Maintenance
 - Stakeholders – Plant Maintenance, I/T, Operations

Manage all IT aspects of implementation of 3rd party vendor solution to schedule, monitor, cost and report on all Plant Maintenance activities utilizing a Work Order System. New Novell server technology introduced at the time first LAN in company.

EDUCATION AND PROFESSIONAL DEVELOPMENT

Change Management Certification – Prosci (2016)

Project Management Professional (PMP) Designation – Project Management Institute (2004) renewed (2007, 2011, 2016)

Project Management Masters Certificate - Schulich School of Business York University (2004)

Business Administration Diploma - I/T Major, 3-year program, Conestoga College, Kitchener, Ont. (1978)

PROFESSIONAL & VOLUNTEER ASSOCIATIONS

Speaker - Project World Vancouver – 2007

Speaker - Project World Vancouver – 2006

Member Project Management Institute – 1996 to Present

Chair Conestoga College IT Program Advisory Committee – 1996 – 1998.

Member Conestoga College IT Program Advisory Committee – 1985 - 1995