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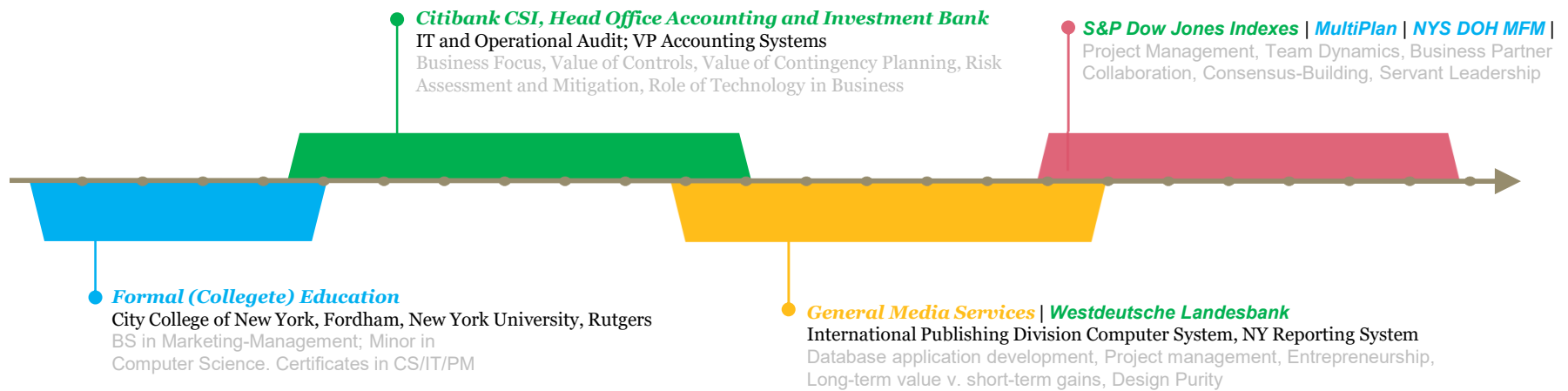5. Project Tools & Artifacts
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[View Profile]

30,000 Foot Overview
(aka, How Did I Get Here?)

Citibank CSI, Head Office Accounting and Investment Bank
IT and Operational Audit; VP Accounting Systems
Business Focus, Value of Controls, Value of Contingency Planning, Risk Assessment and Mitigation, Role of Technology in Business

S&P Dow Jones Indexes | **MultiPlan** | **NYS DOH MFM** |
Project Management, Team Dynamics, Business Partner Collaboration, Consensus-Building, Servant Leadership

Formal (Collegete) Education
City College of New York, Fordham, New York University, Rutgers
BS in Marketing-Management; Minor in Computer Science. Certificates in CS/IT/PM

General Media Services | **Westdeutsche Landesbank**
International Publishing Division Computer System, NY Reporting System
Database application development, Project management, Entrepreneurship, Long-term value v. short-term gains, Design Purity

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Keys

Companies
Roles, Titles, Projects
Key Experience

Education / Pre-Career	*The Formulative Years*	*The Middle Ages*	*The Here-and-Now*

Project 1: Medicaid Financial Management Tracking System Migration

Situation (Challenges)

- Extremely critical production cycles – NYS Medicaid ($52 Billion annually; hundreds of thousands of claims per weekly cycle; millions of beneficiaries)
- Legacy accounting system migration (part of a larger $562 Million project)
- Team Size: 10+; cross-functional
- Scarce Subject Matter Expertise (SME)
- No technical SME for application; lack of business rules/processing flows
- Change in senior departmental management
- Political/organizational negative impact due to behind-schedule related project (NYMMIS)

Action

- Introduced various project management "best practices" based on environment
- Kanban (Trello) – Define backlog / ID Priority (LEAN)
- SCRUM – Due to need to stabilize existing application while project progresses
- Weekly Inter-project Status Reports implemented – Transparency between related projects
- Reverse Engineering of legacy application focus as component of defect resolution
- Structured Logic data flow diagram artifacts introduced as part of each user story completion

Result

- Adaptation of "best practices" rather than "business as usual" mentality
- Increased confidence level of external stakeholders / agency management due to transparent status reporting
- Increased project work flow to sister project (NYMMIS) via data flow diagrams
- Clear identification of critical v. low-value (Value Points : Story Points ("VE") Ratio) requests (LEAN)
- Significant progress in decommissioning of major legacy application subsystems
- Stabilization of legacy application

Project 2: MultiPlan Billing & Receivables Accounting Rewrite

Situation (Challenges)

- Executive Management – "Last Straw" after multiple failed attempts
- Accounting Division Director enforcing a "no involvement" policy throughout the Accounting organization, resulting in non-existent Subject Matter Expertise (SME)
- Legacy accounting system migration – Accounts Receivables & Payables application
- Team Size: 12; technical
- Little-to-no technical understanding for the application (technology, business and processing logic)
- Newly-established development team

Action

- Introduced LEAN approach to reverse engineering backlog to resolve development team velocity issue
- Championed iterative approach to culling of business logic from legacy application using progressive elaboration
- Introduced use of data flow diagrams to quickly communicate processing and data logic for those options (stories) handled in each Sprint. Where needed more diagrams were elaborated in an iterative process

Result

- Morale—especially in the legacy reverse engineering team—improved as new approach provided an opportunity to meet the unreasonable timeline
- Improved stakeholder confidence in the project
- Buy-in to the use of a progressive elaboration / iterative approach to reverse engineering activities expanded as Sprints completed and team became more comfortable with "just-in-time spec-ing"
- Development team velocity drastically improved; idle time essentially eliminated
- Rewrite (migration) project completed on-time. JOBS SAVED!

Project 3: Dow Jones Indexes – Multiple Concurrent Projects

Situation (Challenges)

- Very challenging environment with extremely data-intensive (billions of rows; multiple terabytes of data) requirements
- Multiple high-value, high-visibility projects in execution concurrently in a 40-headcount IT department
- External impact on teams due to multiple mergers and acquisitions of Dow Jones Indexes over a 3 year period
- Application generates over 830,000 global indices supporting more than 575 ETFs with over $400 billion in assets invested with daily, hourly, trade-level price capture for tens of thousands of stocks worldwide
- Multi-technology, multi-vendor environment
- Servicing the biggest names in the Investment section; up-time, stability and accuracy are of paramount importance

Action

- Obtained buy-in and introduced practices to effect consistency throughout disparate technologies and systems (e.g., formal Release Notes, internal documentation/modification histories, iteration/project status reporting
- Worked with key stakeholders for resource allocations and prioritization of competing projects
- Worked with business management to gain support for long-term efforts to stabilize system architecture and introduce application framework to improve development team efficiency
- Spearheaded effort to identify and introduce Visual Studio .NET development framework (StrataFrame)
- Initiated Project rescue efforts on the Index Review System after a prior multi-year project failure

Result

- Business customers and stakeholders embraced more-consistent approach to application presentation and deployment due to consistent approach across platforms
- Product backlog management improved; distinction of high-value v. low-value requests clarified
- Development teams embraced use of application development framework to improve velocity on story completion with focus on DJI-unique business rules rather than application infrastructure/plumbing
- Successfully completed multiple high-effort projects including Index Review System (IRS), iVenture Capital (iVC), iSymbology (iSym), Corporate Action Backfeed (CABF) and others

Project Tools & Artifacts

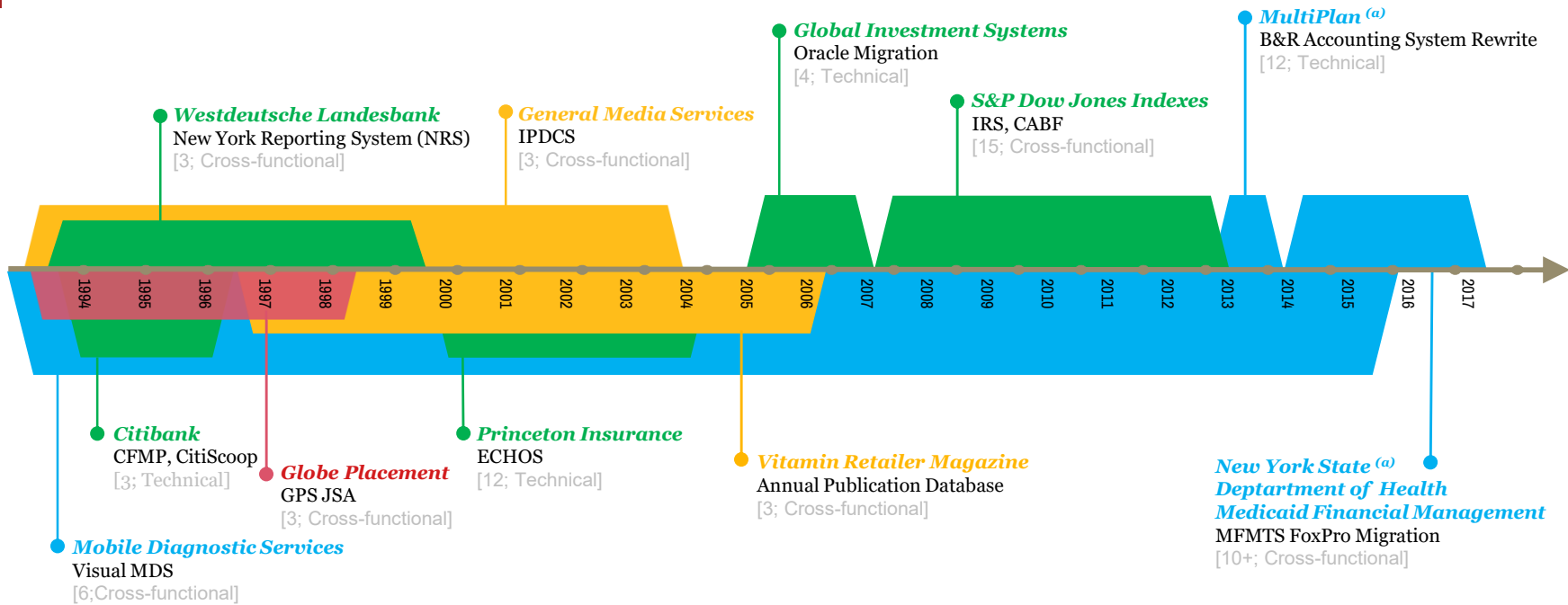### Favorite Tools & Artifacts

- ✓ Trello (Kanban, SCRUM)[a]
- ✓ Microsoft Project
- ✓ Microsoft Visio[a]
- ✓ Data Flow Diagrams[a]
- ✓ UML Diagrams
- ✓ Evernote, OneNote
- ✓ PMBOK
- ✓ ProjectManagement.com
- ✓ Periodic Project Status Reports to Stakeholders[a]
- ✓ Release Notes

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[a] Shown

Timelines (abridged)

Global Investment Systems
Oracle Migration
[4; Technical]

MultiPlan [a]
B&R Accounting System Rewrite
[12; Technical]

Westdeutsche Landesbank
New York Reporting System (NRS)
[3; Cross-functional]

General Media Services
IPDCS
[3; Cross-functional]

S&P Dow Jones Indexes
IRS, CABF
[15; Cross-functional]

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Citibank
CFMP, CitiScoop
[3; Technical]

Globe Placement
GPS JSA
[3; Cross-functional]

Princeton Insurance
ECHOS
[12; Technical]

Vitamin Retailer Magazine
Annual Publication Database
[3; Cross-functional]

New York State [a]
Deptartment of Health
Medicaid Financial Management
MFMTS FoxPro Migration
[10+; Cross-functional]

Mobile Diagnostic Services
Visual MDS
[6;Cross-functional]

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