
ORGANIZATION CHANGE & TRANSFORMATION DIRECTOR

Accomplished strategic change director with proven track record guiding organizations through complex change, establishing effective governance, and helping leaders achieve their objectives. Experience spans strategic initiatives including merger integration, restructuring, and system implementation - for HR, sales, operations & IT; in Technology, Healthcare, Apparel, Public Sector, Utilities, Manufacturing and Oil & Gas. ProSci certified lead change practitioner.

SELECTED ACCOMPLISHMENTS

ORGANIZATION CHANGE AND READINESS

- Established a change management COE, using ProSci change methodology and building a change agent network. Designed an organization readiness survey and created adoption metrics dashboard for tracking change progress.
- Drove stakeholder and employee engagement for complex strategic initiatives, building alignment and buy-in
- Led change & adoption efforts for Epic EMR health care transformation for Clinics and Laboratories in 3 states. Established readiness teams to ensure operational leaders are prepared to implement and adopt new Epic EMR.
- Engaged with Super Users and supported Go-Live with executive rounding, feedback, & targeted engagement.
- Performed culture assessment and led cultural evolution team to define culture for merged companies.
- Led Stakeholder Engagement for global IT network to promote adoption of new support processes and models.
- Co-led Communications efforts, crafting communications plan, defining messages, and guiding internal resources.

BUSINESS TRANSFORMATION

- Managed an HR PMO for a \$20B sales force reorganization impacting 15k employees, including; organization design, job leveling/titling, compensation and benefits, and redeployment. Led global change management effort.
- Sr. Director for HR merger integration of acquired 600-person, \$90M company in Paris, France. Implemented a program management office (PMO) for integration. Led organization redesign and change management teams.
- Sr. Director of merger integration for target 570-person, \$800M company in Vienna, Austria. Led integration efforts for HR, IT, Finance, Legal, & Admin. Services. Drove employee retention efforts, created readiness survey.
- Led an HR PMO with functional teams including organization design, compensation and benefits, job leveling and titling, change management, and works councils. Developed a web-based HR M&A Playbook.
- Developed governance model for \$200M program with SLA's for IT support of global video conferencing.
- Established budgets, policies, decision-making, and review process for multiple major program efforts. Developed and managed a portfolio review process for program evaluation, prioritization and approval.

ORGANIZATION EFFECTIVENESS AND EXECUTIVE COACHING

- Led organization design team effort to redesign sales force and supporting operational teams for global commercial sales; validated design with stakeholders and led adoption efforts in supporting of implementation
- Facilitated Organization Design effort to align organization to new processes with efficiency and accountability.
- Designed and facilitated executive off-sites including stakeholder alignment, decision acceleration, strategic planning, and team building using *Five Dysfunctions of a Team*, *Meyers Briggs-MBTI*, and *Strengths Finder*.
- Led strategic planning efforts for business initiatives, translating objectives into operational and tactical plans.
- Provided executive coaching and leadership development to executives for performance issues & career transitions
- Designed & facilitated Trainings on leadership, communication, strengths, resilience, trust, change & more.

MAJOR ENGAGEMENTS

- Healthcare: *Epic EMR Implementation* for 3-state hospital system; readiness and adoption efforts
- Technology: *Merger Integration* of 2 Fortune 50 companies; HR PMO to manage multiple work-streams
- Technology: *Restructuring* of commercial sales force; PMO for customer segment model & process alignment
- Software: *Merger Integration* of enterprise software Co’s; led HR, IT, Finance, Comms & Legal work-streams
- Software: *Merger Integration* of business intelligence companies; PMO to coordinate work-streams
- Utilities: *Operations Improvement* for field service including change agent network & change readiness assessment
- Apparel: Supply Chain fulfillment *SAP implementation*; replenishment model for high-volume products
- Oil & Gas: IT Support for global *Video Collaboration*; Engagement, organization design, governance.
- Automotive: Manufacturing Materials *ERP Implementation*; standard bill of material, procurement & inventory

EDUCATION & CERTIFICATIONS

MBA – Management	CORNELL University, Johnson Graduate School of Management	Ithaca, NY
BS – Mechanical Engineering	CORNELL University	Ithaca, NY

ProSci Change Management Certification, Organization Development Certificate
 ICF Certified Coach - PCC, Hogan Leadership, Meyers-Briggs, StrengthsFinder

CORE EXPERTISE

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|-----------------------------------|-----------------------------|---------------------------|
| ▪ Change/Transition Management | ▪ M&A Merger Integration | ▪ Executive Coaching |
| ▪ Organization Development/Design | ▪ Business Transformation | ▪ Leadership Development |
| ▪ Human Resources Transformation | ▪ Program Management Office | ▪ Training & Facilitation |
| ▪ Culture Integration | ▪ Strategic Planning | ▪ Communication Strategy |

CAREER HISTORY

Director of Consulting COLLABORAS Consulting Corvallis, OR 2007 – present
 Principal Consultant & Owner - organizational consulting and executive coaching to corporations and public sector. Lead change management and alignment for strategic initiatives. Provide executive coaching for professional development.

Lead Change Consultant – Procurement Transformation Cushman Wakefield Chicago, IL 2019
 Served as Change Lead for multi business unit restructuring and process improvement to institute new business model.

Sr. Director - Merger Integration CA TECH. (M&A PARTNERS) Plano, TX 2017
 Sr. Director of merger integration for target 570-person, \$800M company in Vienna, Austria. Led integration efforts for HR, IT, Finance, Legal, & Admin. Services. Drove communications, employee retention efforts, & readiness survey.

- Served as *Functional Team Advisor* for HR, IT, Legal & Finance teams to prepare program deliverables and create robust plans for functional integration. Co-led *Integration Management Office* to coordinate integration efforts.
- Facilitated large *Cross-functional Meetings* to develop & update integration plans and identify critical deliverables.
- Measured *Employee Engagement* with readiness survey and translated to metrics dashboard to track adoption.
- Co-led *Communications* efforts, crafting communications plan, defining messages, and guiding internal resources.

- Sr. Change Management Consultant** PEACEHEALTH Eugene, OR 2014 – 2016
 Led health care transformation enabled by Epic EMR system implementation for Clinics & Laboratories across 3 states and 45 facilities. Consulted with executives and employees; facilitated readiness teams and supported program events.
- Led *Program Engagement with Medical Clinics and Laboratories*, including executive relationships, leadership staff meeting updates, serving as ‘translator’ between program and clinical / operational teams
 - Facilitated *Readiness Teams* to prepare clinical & operational leaders for their teams’ participation in program activities including: Training, Testing, Road Shows, Super Users, Backfill, Informatics, and Dress Rehearsals
 - Spearheaded *Change and Adoption* activities including Go-Live support (executive rounding, assessments, morale), Event engagement (testing, training, super users, road shows, dress rehearsals, celebrations), Training (super users, change resistance, change & adoption, leadership sponsorship), Communications messaging.
- Governance & Org. Capability Lead** CHEVRON Corp. (Contract) Houston, TX 2013
 Served as lead consultant developing a governance model for global support of video conferencing. Negotiated service level agreements, and drove behavioral change to ensure adoption by business units.
- Facilitated design & approval of *Governance Processes* to stabilize institutionalize video collaboration support.
 - Led *Stakeholder Engagement* for global IT network to promote adoption of new support processes and models.
 - Co-led *Organization Design* effort to align organization to new processes with efficiency and accountability.
- Sr. Org. Change Consultant** DAIMLER TRUCKS (Contract) Portland, OR 2012
 Led organization change for global bill-of-materials system implementation. Conducted stakeholder assessment, and change readiness survey; targeted employee engagement and communication.
- Manager, Change Management Office** PORTLAND GENERAL ELECTRIC Portland, OR 2011
 Established and managed change management office, served as lead organization change consultant to establish change consulting service deployment, change methodology, change measurement, and change agent network.
- Sr. Program Manager** NIKE Inc. (Contract) Beaverton, OR 2010
 Program manager for Always Available, a new global supply chain model offering selected products on continuous replenishment. Created and managed a new program structure, governance, and reporting.
- Sr. HR Director, Merger Integration** BUSINESS OBJECTS-SAP (Contract) San Jose, CA 2007
 HR Director for merger integration of 600-person, \$30M global company. Led an HR PMO with teams for organization design, compensation and benefits, job leveling and titling, and change management.
- Sr. Business Development Manager** INTEL Corp. Hillsboro, OR 2006
 Developed software partner marketing programs in creativity & digital entertainment markets yielding \$100M in sales.
- Strategic Change Consultant** HEWLETT PACKARD Co. Palo Alto, CA 2003-2005
 Consulted with senior executives on critical cross-company strategic growth initiatives and reorganizations. Led fast-track, virtual program teams; providing program management, change management, organizational design, coaching.
- Business Development – Public Sector** HEWLETT PACKARD Co. Corvallis, OR 1999-2002
 Managed \$350k budget for State & Local government marketing. Led partner engagement for Health & Human Services.
- Strategic Planner / Supply Chain Analyst** HEWLETT PACKARD Co. Corvallis, OR 1995-1998
 Managed strategic planning for global supply chain team. Facilitated executive strategy sessions for \$4 B business.