

## Business Service Owner & Technology Senior Leader

Leadership | Capability Product Management | Relationship Management | Risk Management

- ✓ Over 20 years assessing projects, technology, and processes across financial services bridging gaps, acquiring deep understanding of needs, and driving initiatives to achieve quick wins and long-term goals.
  - ✓ Inspirational Manager curating cross functional Business project teams and individuals driving engagement, professional development, optimal performance.
  - ✓ Extensive experience leveraging multi-national BPO partnerships to augment & streamline operating models, technologies, and product delivery to achieve key performance metrics and business growth.
  - ✓ Exceptional relationship building skills with staff and executives, fostering long-term, life cycle experiences and partnerships with contacts at all levels.
- Recognized for successful planning and aptitude for action in leading document capture and business process outsourcing, technology acquisition, Document Input Solutions, production support, & continuous improvement.

### CORE COMPETENCIES AND PROFICIENCIES

- Capability / Product Ownership
- Project Management
- Business Service Management
- Problem Solving
- Backlog Refinement
- Document AI (Automation)
- Intelligent Document Processing
- Technology Service Delivery
- IT Change Management
- Production Support
- KPIs & Metrics
- Prioritization
- Dashboards and Reporting
- Career Coaching
- Agile Methodologies & Tools

### Professional Experience

2007 to 2024: Guardian Life Insurance, New York, NY

17 Year career with increasing responsibilities and leadership roles from IT contributor, tech and operations team management, solution implementation lead, production support management, operations director, Business Services Capability Product Manager.

“Chris has consistently demonstrated the ability to drive all aspects of a service, from creating and selling the vision, to developing and to strategy, to monitoring and continuously improving the processes.”

- AVP of Business  
Technology Shared  
Services

### Product Manager, Business Shared Services (2021 – 2024)

Business & Technology Services leader responsible for client management and service delivery for business operations, technology solutions, and external partnerships. Managed customer request backlogs and strategic roadmaps.

- **Head of Operational Effectiveness and Service Delivery** – Stood-up Agile Release Train consisting of Technology platform and architecture, QA testing, vendor delivery managers, BA's. Lead M&S workstreams. Increased commitment horizon of least performing team from 2 weeks to 12+ weeks.

- **Services Product Management** –delivered business outcomes by developing Epics & Features. Strategic planning, cost management, and curating PI planning events. Created organizational capability matrix across the enterprise identifying underserved departments and capability saturation as inputs into internal growth strategy.

- **Business Relationship management** – Led Quarterly Business Reviews with senior leadership using quantitative and qualitative metrics, strategic roadmap alignment with

business goals. Oversaw creation business data analysis and reporting utility for leaders to make better decisions.

- **Strategic Projects** – Led solution design, business case development, and managed implementation teams to achieve strategic outcomes. Evaluated technologies, BPO vendors, and technology for opportunities to innovate and streamline manual processes around digital & automated capabilities. Key Programs:
  - Dental Claims Automation– Applying OCR and AI to automate ADA claim forms handling towards reducing 14 data FTE processing over 8M claims each year. Leveraged machine learning to classify and extract patient and claim data with human-in-the loop training practices. Applied business logic and API integrations verify customer data and procedure information with business systems.
  - Absence Comprehensive Experience - oversight of multiple vendor workstreams for transformation program to overhaul processing of Absence claims leveraging new API integrations and process flows resulting in streamline intake and self-service capabilities, enhanced client communications, and check handling.
  - Covid Response – Leveraging digital document input solutions to transform manual processes and ways of working into online business processes and enabling remote work.

### Director, Business Shared Services (2016 – 2021)

Led enterprise imaging operations responsible for 120+ resources and \$2M annual budget. Developed strategic roadmaps for streamlined operations with technology & BPO partnerships to multi-national service providers. Chaired Center of Excellence for document input processing across businesses functions to identify innovation opportunities and to standardize around streamlined and digital operations.

- **Right-Shoring Operations** – Accountable for outsourcing 22+ person nationwide legacy work intake and processing operation to multinational vendor. Sourced and evaluated vendors and helped negotiate 7 year multi-million dollar deal responsible for 32+ million pages and transactions each year.
- **Strategic Program Lead** – of cross functional team of technology partners, BA's, trainers, QA testers, compliance, and change management. Transitioned outsourced operations and closing 2 regional mail processing operation centers. Lead domestic and international compliance site visits as part relationship and process verification duties. Accountable for overall program design, execution, monitoring, charge back models.
- **Reducing Total Cost of Service** – Lead technology platform and licensing evaluations. Generation of future state operational roadmaps. Oversaw technology lifecycle programs resulting in \$1.2M annual savings through consolidation, migration to Cloud solutions.
- **Process Redesign**– Responsible for operations and business process analysis to innovate and streamline operations with technology enabling users to do more digitally and with higher impact. Increased system integrations and leveraged robotic processing to enable faster processing of work with reduced handoffs and higher quality.
- **Digital Transformation** - Transformed an entire corporate iMail solution ahead of Covid consolidating the flow of work to centralized mail centers for scanning and enabling remote work. Leveraged scanning automation and Content Management solutions and work management. Increased automation to reduce handoffs and staffing requirements. Quickly replicated operating model and responded to Covid enabling business teams to take on and redesign business processes for remote work.

### Technology Manager, Enterprise Production Support and Development (2013 – 2016)

Led enterprise technology teams responsible for implementation and technology lifecycle of multiple enterprise capabilities and international production support operations. Oversight for onshore / offshore development teams and SaaS technology partnerships. Led M&A capability and technology evaluations and migration efforts.

- **Technology Platform Owner** – Responsible for 99.99% uptime, total cost of ownership, maintenance lifecycles, scalability of enterprise technology On-Prem and SaaS platforms including Enterprise Content Management systems, BPM platforms, Microsoft SharePoint, Kofax Capture, Content Search and integration Web Applications, Omni-channel customer communication platforms, electronic signature.
- **Architecture & SDLC Review Boards** – Participated on board for enterprise architecture and security reviews responsible for adherence to enterprise standards, technology blueprints, support and reliability practices. Quality Assurance of technical design documentation.

- **Incident Management Lead** – Level 3 incident and outage response team lead. Responsible for crisis management and after action reporting and lessons learned and resolution process. Program lead for Post Super Storm Sandy response team.

### Technology Lead Analyst, Document Processing Solutions (2007 – 2013)

Lead software engineer responsible for system administration of enterprise technology and application development in Dot Net and Java. Created various in-house utilities and user facing applications. Led IT support practices for user facing support, technology administration and response.

- **Solution Analysis**- Utilized document capture technology and user software to replace manual workloads between case managers through digital scanning, Content Management and workflow solutions. Created EDI claim processing and reconciliation utility to batch process 30,000-40,000 claims and initiate workflow items each morning.
- **System Design** - replaced custom systems with enterprise standard platforms and capabilities reducing support complexity, increasing resilience, reducing licensing and maintenance expenses. Consolidated 6 custom department imaging platforms with Kofax Capture and IBM FileNet adding automation capabilities to workflows.
- **Capability Owner** - Curated and led Technology Expos demonstrating capabilities and interfacing with business leaders and end users. Grew customer awareness of enterprise platforms and capabilities. Created a customer request intake and management process.
- **Solution Architect** – Leveraged Proof on Concepts to explore new enterprise capabilities and shift to SaaS for rapid prototyping and implementation. Responsible for leading project teams through SDLC lifecycles. Key Efforts include:
  - Enterprise Electronic Signature – evaluation and selection process through technology reviews and implementation program. Delivering an enterprise compliant and scaled capability through API's enablement.
  - Business Case Management platform for financial services workflows. Partnered with vendors and business to evaluate solutions and design enterprise platform architecture, implementation, and production support.
  - Confirmed Messaging – Solution for generation of outbound customer communications and confirmation of delivery through a new platform. Lead solution capability design, architecture and SDLC, implementation, integration with business systems and production support.

### 2006 to 2007: IT Systems Consultant – EDS – AHOLD, Quincy, MA

Lead team of multi-national outsourced technology consultants to support technology application development and support.

- Training international team members and creation of technical specification and process documentation.
- Partnered with business technology teams to capture detailed requirements for application enhancements. Developed custom application enhancements and system maintenance.
- Provided 24 x7 Production support and disaster recovery.

### 2004 to 2006: IT System Analyst - AHOLD USA, Quincy, MA

- FileNet content management systems administrator. Responsible for system availability and sizing.
- Dot Net application development, enhanced workflow management software for business workflow management.
- Developed custom scanning application and digitization of faxes and emails into business financial workflows.

### Recognition and Awards

- Guardian Executive Leadership Development Program (2022)

- NY Metro SIM – Regional Leadership Forum (2021)
- Guardian IT Elite Award (2012) – Individual award for reducing storage by 1 TB of storage by leading effort to consolidate and migrate long term storage devices and saving \$1.6M over 10 years.
- Guardian IT ‘On the Spot Award’ (2009) – Implementing new technologies to implement Fax and Email capture solutions to reduce costs from manual printing and scanning operations.
- Guardian IT Elite Award (2008) - Team efforts in the support aging technologies and replace ECM Search and Retrieval applications across multiple lines of business.

### Education, Leadership, Training

- University of Rhode Island - **Bachelor of Business Administration, Management Information Systems**
- AI / ML Product Management - **ELVTR**
- Regional Leadership Forum - **Society of Information Management**
- Emerging Leader Development Program – **Guardian Life Insurance**
- Safe for Teams, PO/PM 5 – **Scaled Agile**
- ECM platform administration FileNet IS Systems and Advanced IS Administration - **IBM**
- Kofax Capture administration - **Kofax**
- Business Process Server Administration - **IBM**