

"There are no failures, only outcomes" | <https://cv.rooz.live/credly>

"For small creatures such as we the vastness is bearable only through love";

"How wonderful that we have met with a paradox. Now we have some hope of making progress."

Orion's "Integrity" embodies foundational values of trust, respect, candor, humility, and a mission success integrated effort.

[GoodReads.com/DrivenCompassion](https://www.goodreads.com/book/show/12002328-Driven-Compassion) (accepting recommendations) | <https://cv.rooz.live>

PROFESSIONAL SKILLS

MANAGEMENT:	Agile Coach; Application Lifecycle Management (ALM); Business Intelligence; Business Object Modeling; Business Process Modeling / Management (BPM); Client Server Architecture; CMMI; Continuous Deployment & Integration; Data Aggregation; Data Analytics; Distributed Architecture Data Warehouse Design; Extract Transform Load (ETL); Holacracy Coach; Information Lifecycle Management (ILM); Lean/LeSS Coach; Lean Portfolio Management (LPM); Master Data Management (MDM); Metadata Governance; Network Management Principles; Release Train Engineer (RTE/STE); SAFe (Scaled Agile Framework SASM) Certified Advanced Scrum Master; Six Sigma; Unified Modeling Language (UML); Use Case Development & Waterfall SDLC Methodology
FINANCIAL:	Conversant with Hedge Funds, Managed Futures, Exchange Funds, High Yield Fixed Income Investment Management, Private Equity, Trade Settlement/Trade Processing, Stock Loan and Securities Lending. Leveraging coursework in Corporate Finance, Investment Management, Efficiency of Capital Markets, Futures and Options and International Finance
GENERAL BI/DA:	@Risk Simulation; Altova XMLSpy; Apache Cloudera Hadoop; Atlassian (JIRA; Confluence); ELK (Elasticsearch; Logstash; Kibana); EMC Greenplum; Github; HP (Autonomy IDOL 10, Vertica); Informatica Powercenter; JetBrains (TeamCity; YouTrack); Microstrategy, New Relic; Oversight Systems; QlikTech QlickView; R; Segment; SnowPlow; Statistical Analytics; Theobald PPV/XtractIS; Tableau; Tibco Spotfire; VersionOne
ADOBE:	Creative Ste (Acrobat; Captivate; Dreamweaver; Fireworks; Flash; Illustrator; Photoshop & Premiere)
AUDIT:	ACL Audit Exchange; Alpine Miner; CaseWare (IDEA Server, Smart Exporter SAP Connector)
CRM/ERP:	ACT; EGroupware; Goldmine; Microsoft Dynamics CRM; Openbravo; OpenERP; OrangeHRM; OroCRM (Symfony); Salesforce; Siebel; SugarCRM
IBM:	Cognos; Infosphere; Lotus Notes; Netezza; SPSS
MICROSOFT:	Access; Business Intelligence Development Studio (BIDS); Dynamics CRM; Excel (Pivot Tables, PowerPivot w Slicers, Solver, VBA Macros, Vlookup); Fabric; Lightswitch; PerformancePoint; PowerPoint; PowerView; Publisher; Project; Report Builder; SharePoint Designer; SQL Server Analysis Services (SSAS); SQL Server Data Quality Services (SSDQS); SQL Server Integration Services (SSIS); SQL Server Management Studio (SSMS); SQL Server Reporting Services (SSRS); Team Foundation Server, Visio and Visual Studio
ORACLE:	11G; Endeca; Essbase; Exadata; Hyperion Data Relationship Management; OBIEE OBIU ODM & TOAD
SAP:	Business Explorer (Bex); Business Objects (BO); BusinessObjects Data Services/Integrator (BODS/BODI); Business Warehouse (BW); Crystal Reports; Sybase PowerDesigner
SAS:	Analytics; BI Dashboard; DataFlux Data Management Platform; Enterprise BI Server; Enterprise Guide; Information Map Studio; MDM Data Integration Server; Web Report Studio
OS/NETWORK:	Conversant with Apple Mac OSX; AS/400; Canonical Ubuntu; Cisco; Citrix; DOS; ODBC; OpenStack Oracle Sun Solaris / Illumos; Red Hat Linux and Microsoft Windows
TECHNOLOGY STACK:	JavaScript; LAMP (Linux Apache MySQL PHP); DAX/MDX; Ruby on Rails; SQL and XML/HTML

CAREER OPPORTUNITY ^ EPIC.CAB (Tech IT)**IT SERVICES & IT CONSULTING, TRANSPORTATION, LOGISTICS, SUPPLY CHAIN AND STORAGE**

Proven leader with excellent interpersonal and organizational skills, eager to contribute authentic value in the Business Intelligence and Data Analytics arena. Agile Business Analytics Architect / Business Development Manager or Director with 30+ years of professional experience, primarily with *Finance, Marketing & Agile Information Technology*. Consulted with *Global Fortune 100* most reputable companies including:

Bank of America Merrill Lynch, BNP Paribas, Citigroup, Fujitsu, ICBC, KPMG, Pfizer, PWC & Wells Fargo.

PROJECT AVAILABILITY VIA W2 OR CORP TO CORP

TSA PRE✓ VERIFIED – KTN (KNOWN TRAVELER NUMBER) READY

ArtChat (Foundassion)

2021 – Present (c2c)

AI LLM Agentic (Data Analytics Architect) App/Framework/Platform/Protocol Engineer, President Chief Strategic Indicator (LPM) Thriving Agentic Generation (TAG.VOTE) 25+ years of AI TDD

Next Wave Network

2003 – Present (c2c)

Coaching Lead (Agile BI Architect)/Solution Engineer (RTE/SM), President

- ***Agile Appraisal / Assessment / Delivery / Flow / Holacracy / Kanban / LeSS / SAFe***
 - Classroom/Enterprise/Mentor/Online/Program/Portfolio/Team/Virtual Training
 - Certified Scaled Agile Advanced Scrum Master (SAFe SASM Certified)
 - Trained in Implementing SAFe 5 (SPC)

Tailor Made Tech

May 2026 – 2026

Field Technician (Manage Expense Expectations)

At TMT, I played a crucial role in providing tailored IT, cyber security, and communication solutions for SMEs. My responsibilities included managing proactive IT support, implementing advanced cyber security measures, and configuring cloud services. I focused on ensuring system reliability and enhancing client infrastructure, contributing to their business growth. I delivered proactive IT management services to ensure system reliability for SMEs. I provided connectivity solutions tailored to client needs. Assisted with system testing, commissioning, identifying network-related issues impacting stability of conference environment, including performance instability, intermittent network drops soon after connection, clock sync issues, lost frames, as env places substantial demands on network infrastructure, and continuous broadcasting on multiple channels. Brought my test first mindset, safely operating forklifts/scissor lifts in factory warehouses, pulling cables, punching boards, digging trenches, fusing/laying fiber, and related install materials. MSP clients have included Clean Harbors (Terra Nova Solutions), Everblue, Hajoca, IvyRehab, Joinery (Beauty Embrace/Demo Collective), Keller Williams, and United Rentals.

**Apex Systems**

February 2022 – August 2023 (w2)

Bank of America

Remote (Charlotte, NC)

GT&O Consumer, Business & Wealth Management Tech Infrastructure (CBWT)

Portfolio Assessment Lead Performance Engineering & Capacity Management (PE&CM)

Enterprise Agile Coach

Application Production Services Release Engineering and Core Tech Infrastructure (APSRE); Data, Analytics, and Insights Technology (DAIT/SODPS); ...

Technology Infrastructure (TI) Mobilization – Agile Service Delivery

- ~ \$3.5 – 4 billion (Annual Budget)
- Supported multiple workstreams across the GT&O Consumer, Business & Wealth Management Tech Infrastructure (CBWT)
- Improved Agile Service Delivery by enabling modernization while supporting a workforce of 6,000-12,000
- Necessitated close partnership with senior business and technology managers
- Assessed complex technology project teams and trains across multiple technology, operations, and business units
- Coordinated efforts across multiple technology teams / trains and across multiple projects
- Managed multiple projects across multiple related technology teams
- Demonstrated initiative, ownership, and accessible availability by providing large scale agile coaching support mobilizing GT&O Consumer, Business & Wealth Management Tech Infrastructure (CBWT)

Agile Coaching Support:

<https://horizon.bankofamerica.com/docs/display/PCMENABLE/Agile+Maturity+Pilot>

**Apex Systems – Agile Coach**

March 2021 – January 2022 (w2)

**Wells Fargo Agile Coach – EFT (Corporate Risk Technology / Public Affairs & Marketing)** Remote

Provided Agile; Lean; LeSS; Kanban; SAFe coaching services alongside Apex Systems Corporate Risk team, as well as Public Affairs & Marketing team coaches, director, kanban leads, scrum masters, program manager, RTE, program and scaling coach for 21 Corporate Risk Technology and 34 Public Affairs & Marketing teams, including:

ERFT (CARAT - Escalations UI; RAR - Risk Asset Review Target State; RMP - Risk Management Platform)

PAM CVET Video Services, Digital Signage, WFOD, Meetings and Events Planning

- Performed Agile Registry Analysis to understand team composition, readiness, potential impediments.
- Assisted with reviewing and editing of workshop materials, including Agile Team 101, Kanban, Scrum Master, Product Owner, LeSS, Spikes, while aligning towards communication plan that ensured leaders, managers, and team members were to receive cascading information including relevant details about the activities, what to expect, how this affects roles, as well as change readiness evaluation of 51 Corporate Risk Technology and 243 Public Affairs & Marketing team members.
- Tested and assisted in the completion of Agile Health Assessments via interviews with Scrum Masters and Kanban Leads to understand their current knowledge as well as team dynamics and best practices, which supplemented the data that was provided on the registry.
- Attended and coached alongside the team on workshops including Agile Team 101, Kanban, Scrum Master, Product Owner, LeSS, Spikes, with a personal style to maintain focus on continuous relentless improvement, with interpersonal sensitivity, curious inquisitiveness, while also maintaining emotional stability in exploring innovative processes and disruptive thinking, as well as pragmatic options with indicative result metrics.

<https://confluence.wellsfargo.net/display/Agile2020/Corporate+Risk+Agile+Transformation+Home>

<https://confluence.wellsfargo.net/display/PAMAgile>

**Signature Consultants – Agile Coach / Scrum Master**

April 2019 – September 2019 (w2)

Bank of America – GBAMT Global Banking & Markets Tech

Charlotte, NC

SAFe (Scaled Agile Framework SASM) Certified Advanced Scrum Master | Agile Coach | RTE

- Global Banking & Markets Technology Servant Leader (SAFe® - Scaled Agile Framework 4.5 | SASM - Certified Advanced Scrum Master & RTE | Agile Coach) focused on Sales Performance & Profitability Global Data Hub and Reporting space as a potentially new Agile Release Train as well as assisted Treasury & Wholesale Credit Authorized Data Sources teams
- GT&O Global Technology & Operations; GWCDT E2E PORTFOLIO EXECUTION COO GOV
- Scrum Master, RTE, Agile Coach Classroom/Mentor/Online/Virtual Training across teams & trains
- Prepared and coached team agreement alignments, Inspect & Adapt sessions, PI Planning, Scrum of Scrums, PO Syncs, Backlog Refinements, Sprint/Iteration Planning, as well as Daily Standups
- Empowered Dev/Test efforts towards Sprint/Iteration Reviews, Retrospectives & System Demos
- Design and administration of Confluence, Jira and Jira Align custom dashboards

**Signature Consultants – Agile Coach / Scrum Master**

June 2017 – December 2018 (w2)

Bank of America – GT&O Global Technology & Operations;

Charlotte, NC

DQC Data Quality Control; CSWT Consumer Small Business & GWIM Wealth Management Tech

- SAFe (Scaled Agile Framework 4.5 | SASM) **Certified Advanced Scrum Master**
- Wore multiple hats, including Scrum Master, RTE, PM as well as Agile Coach Training until role was filled
- \$130 Million in 2017 and \$150 Million in 2018 part of Data Quality Control (DQC) Program / Marketing Insights & Technology (MIT) Portfolio Management
- Agile Transformation; Release Train Engineer, as well as assisted as temporary Project Manager
- Managing Multiple IT Project Forecasts, \$3MM+ Budget Plans, Disaster Recovery Triage Activities and Risk Communications to Define, Enhance, Deliver, BAU processes with Marketing Technology applications including Enterprise Market Data Reporting (EMDR) and Application Center of Excellence (ACE) Marketing App (MA) Platforms
- Servant-leader, tracking and removing impediments, while coaching team in SAFe Agile practices.
- Facilitate daily standup scrum, sprint planning, demo, grooming and retrospective ceremonies.
- Shield team from outside distractions and interferences
- Leverage tools and insight to help develop team's predictability and progress (velocity, capacity planning, burndown/burn up charts from Rally to Jira, and other tools and metrics)
- Growing Marketing Application Content Library / Profile Pages on 16,000 iPads: