

## Resume

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### Summary of Qualifications

IT executive consultant with extensive experience in project, staff, operations, and process management. Utilizes senior and executive level management experience gained as an employee of several Fortune 500 companies followed by over a decade of consulting experience to help clients successfully meet the challenges of today's fast-paced and demanding IT environment. Experienced in all aspects of the discipline including strategic planning and finances, program and project management, requirements engineering, software development, package implementation, infrastructure & operations, configuration management, data telecommunications, etc. Particularly strong in building teams that will continue to succeed in future endeavors and in bridging the communication gaps between IT & business and technologists & management. Project Management Professional (PMP) and Certified Scrum Master (CSM) actively involved with several Orange County professional organizations. A frequent lecturer on management and methodology disciplines. A graduate degree in Management Science is supplemented with additional post-graduate work at UCLA's Anderson School.

Clients have included large corporations such as PacifiCare (United Healthcare), TDWaterhouse (TD Ameritrade), Capital Group, County of Orange, and Behr Processing Corporation. Also worked with smaller financial services and insurance companies, and a start-up developing specialized GPS applications.

- *strategic planning and project portfolio management*
- *project management – especially project recovery of mission critical projects*
- *interim management, staff development, process improvement*

### Professional Experience

#### **Independent Management Consultant** (2000 to present)

#### **A representative sampling of services provided to clients:**

##### **Project management**

- For a financial services company managed a program consisting of eight projects and teams focused on restructuring the network configuration, improving network security, and defining new standards. Also oversaw server consolidation and virtualization projects.
- For a leading electronic brokerage firm; acting as the senior project manager, guided the successful implementation of a *multi-national wireless e-commerce* project which provided brokerage and investment research services via web-enabled mobile phones and wireless computing platforms. Directed enhancements to *web-based B2B application* delivering brokerage and portfolio management functionality to financial services companies.
- For a national health insurance company; directed two enterprise-level projects as part of a strategic organizational effort to restructure the corporation's core information systems. Responsible for coordinating the efforts of multiple teams across several organizational structures as well as outside vendors. The projects included:

- An enterprise-wide financial planning and forecasting system providing sophisticated desktop tools for robust data manipulation at the department level with a centralized database for multiple levels of consolidation and reporting.
- A pricing and underwriting system to enhance product modeling and ability to predict profitability across markets and products.
- For a small, privately held financial services company; guided the recovery of a mission-critical project developing a commercial web-enabled financial services application. Project included offshore development staff. Technologies utilized included: SQL Server, Visual Basic, XML, HTML, and Active Server Pages.
- Provided project and requirements management services to an organization developing a commercial Location Based Services product which allowed consumers to use cell phones to track GPS-enabled devices. Technology based upon web service design allowing integration with third parties in a Service Oriented Architecture (SOA). Utilized J2ME, SOAP, XML, Linux, and MySQL.

### **Process and organizational development**

- For a multi-national financial services company; developed and documented a complete *customized software development methodology* based upon Object Oriented Analysis/Design and Agile software development techniques. Mentored staff in application of processes including:
  - Established an Office of Project Management (PMO) and directed project management staff
  - Provided formal training in Object Oriented Analysis and Design with the Unified Modeling Language
  - Coached recently promoted staff in Configuration Management and Quality Assurance practices
- As *advisor to executive management* team, provided guidance on issues dealing with organizational structure, staff development, and strategic planning.
- For a national health insurance company; provided a formal evaluation of the organization's system development methodology alignment with *Sarbanes-Oxley* requirements.
- Consulted with executive management of a company transitioning from a start-up to a growth model. Assisted in development of an *organizational structure* allowing scalable and flexible growth.
- For a regional health insurance company; advised project and functional line managers in tools and techniques for *managing teams using agile processes*.

### **Functional management**

- For a managed services healthcare organization acted as Director of IT overseeing project managers, business systems analysts, and quality assurance analysts. Responsible for program portfolio management and working with C-level executives to fulfill organizational strategies through prioritization and execution of IT projects. Coached and mentored IT division in implementation of Agile practices based on the Scrum methodology. Oversaw delivery of several dozen projects and package implementations.
- For a major health insurance company; as acting QA Test Manager oversaw the planning and execution of a system-wide regression testing effort to evaluate the organization's readiness to support the new Medicare Part D prescription programs. Assisted the organization in the establishment of formal test management processes. Technologies utilized included: Mercury Interactive Quality Center, IBM iSeries and WebSphere
- For a multi-national financial services company; helped establish a Quality Assurance team to support a custom software development group. Included developing services, building a team, and mentoring a newly promoted manager.
- For a local government agency, performed the role of QA Manager; developed a strategic testing plan for a large-scale program, built a test team, implemented automated testing tools, and oversaw development of automated test cases.

### **Staff development:**

- For a regional health insurance company; provided **training for business analysis staff** in the discovery and management of requirements supporting agile development methodologies (Microsoft Solutions Framework for Agile, Scrum). Training was followed with several months of coaching staff in the practical applications of these techniques.

### **Board positions**

- Board member for Southern California Coalition Technology Conference (Southland Technology Conference) (2007, 2008)
- Board member for International Institute of Business Analysis (2008-2009)
- Board member for Southern California Quality Assurance Association (2008)

### **Project Management Institute, Orange County, CA**

- Instructor: PMP Certification Examination Preparation course.
- Instructor: An Introduction to Object Oriented Analysis and Design with UML

### **Cendant, Mission Viejo, CA (1998 to 1999)**

#### **Director**

Executive level manager responsible for Project Management and Systems Analyst teams. Also responsible for formal **Software Engineering Process Management** and staff training. Led multiple teams developing large-scale applications utilizing *n*-tier distributed architectures. Systems were developed utilizing **Use Case and Object Oriented** analysis, design, and development techniques. Staff of 35. **Acting head of division** in special circumstances with a staff of 125+.

- **Directed** large (1,000+ man-month) application development effort utilizing Java, Microsoft Visual Basic, Transaction Server (MTS), Internet Information Server (IIS) and SQL Server. Project involved porting separate legacy client/server and mainframe applications to a distributed *n*-tier application providing access to a consolidated data warehouse.
- **Spearheaded implementation of formal project and development disciplines** which led to reduced development time and improved product quality through the use of consistent plans, repeatable processes, reusable design models, and controlled system promotions.
- **Negotiated** annual IT budget and project schedules with client's executive management including the CFO and CEO.
- **Re-architected project cost tracking controls.** Provided financial management for the division including budget planning and control, time tracking, and cost allocation for multiple clients. Annual operating budget of nearly \$15 million.

### **SEI Information Technology, Los Angeles, CA (1997 to 1998)**

#### **Lead Consultant**

Senior level consultant with national firm specializing in development of core business systems for Fortune 500 companies. Responsibility for management consulting in the areas of project and process management.

- **Cendant.** Initiated development and implementation of a **formal Process Management** effort focusing on application development and project management methodologies. Assignment included increasing management responsibility within Cendant leading to a permanent position with the company.
- **Sony Pictures.** **Re-engineered Material Resource Planning function** for the video distribution unit. Project involved the evaluation and selection of a commercial material resource planning software package.



## **UCLA Medical Center, Los Angeles, CA (1996)**

### **Manager, Network Services**

Senior telecommunications IT officer for the Medical Enterprise including UCLA, Neuro-Psychiatric, and Santa Monica Hospitals and the UCLA School of Medicine. Led design and implementation of a *state-of-the-art enterprise-wide data network* serving nearly 10,000 nodes. Staff of 20.

- Developed technical strategy to meet the needs of a rapidly expanding organization. Defined *telecommunications service models* based on service level agreements, project management standards, pre-negotiated pricing, and out-sourced support contracts.
- *Negotiated service contracts* with telecommunications and network service providers. Re-negotiated the GTE Sonet/ATM contract saving the enterprise nearly \$300,000 over the five year life of the contract.
- Led strategic development of manageable, scaleable, and redundant network based on latest industry standard architectures including ATM, switched Ethernet, Frame Relay, and ISDN. Coordinated the re-design and implementation of a *fully managed network* for Santa Monica Hospital including remotely managed workstations and network infrastructure.

## **MCA/Universal City Studios, Universal City, CA (1989 to 1996)**

### **Associate Director, Network Planning and Administration (1995 to 1996)**

Managed migration to a *multinational data network*. Directed project managers, set project priorities, assigned resources, and ensured that systems fit the strategic plan for a global data network.

- Defined *technical strategy* to meet growing needs of highly diverse organization. Evaluated and implemented high-speed data transmission methods including ATM, Switched Token Ring, Frame Relay, and ISDN.
- Led conversion of MCA data network from domestic, legacy architecture to an *international Wide Area Network* providing full service access to eight new international offices. Expanded and enhanced domestic offices including the campus area network at the Studio.

### **Manager, Studio Division Systems (1989 to 1995)**

As division's senior Information Officer, responsible for planning, design, and implementation of applications for the Studio Division. Directed activities of project managers including setting project priorities, assigning resources, and ensuring that projects met time and budget constraints as well as user expectations. Staff of 20.

- *Developed technical strategy* to address needs of 48 diverse business units utilizing a variety of technologies and computing platforms. Coordinated the implementation of numerous business-unit specific custom and packaged applications and integrated them with a centralized financial system. Several systems required heavy use of bar-coding and scanning technologies.
- *Reengineered the business process* for order entry and consolidation. Migrated Studio from manually intensive order entry and billing system to a highly automated process that reduced invoice creation time from weeks to days resulting in significantly improved cash flow.
- *Agent of change* converting division's reliance on expensive custom developed applications to use of cost effective, off-the-shelf packaged solutions. In one case, implemented a single package which replaced several maintenance-heavy custom applications. This acquisition saved the Studio over \$100,000 and eliminated need for a full-time support staff position.

## **Security Pacific National Bank, Los Angeles, CA (1981 to 1989)**

Filled a variety of positions in several IT departments with increasing staff, project, and financial responsibility starting as a Programmer and rising to the level of senior project manager with the title of **Vice President**.

## **Education**

### **Certified Scrum Master**

Scrum Alliance

### **Project Management Professional Certification**

Project Management Institute, Orange County

### **Managing the Information Resource**

UCLA Executive Management Seminar, Anderson School Executive Education

University of California, Los Angeles

### **Master of Science, Management**

California State University, Northridge

### **Bachelor of Science, Accounting and Marketing**

California State University, Los Angeles