

BUSINESS AND CHANGE CONSULTANT

Strong leader and team builder noted for creativity and innovative thinking, passionate about people and business performance. A proven record of driving business outcomes focused on strategic value, product and change planning as well as operations and tactical change execution. Over thirty years' experience across:

- Executive Relationships
- Change Management
- Coaching and Mentoring
- Team Forming and Leadership
- Strategic Consulting
- Project Management
- Organizational Readiness
- Adoption
- Benefit Measurement
- Enterprise Strategic Planning
- Product Management
- Business Development
- Corporate Communications
- Press / Analyst Relationships
- Market Analysis & Development

PROFESSIONAL EXPERIENCE

Independent Management Consultant, Bellevue USA Seattle, September 2014 to present

Established as an independent management and change consultant, David delivers custom consulting engagements and continues to engage at the highest levels with the largest organizations. Recent engagement examples delivered directly or through partnerships include direct and "v-dash" engagements at Microsoft as well as projects in Workplace Strategy and IT Architecture with Boeing, Chevron Costco, MetLife, Novant, Coke and others. Some examples:

As Project Lead for the FY19/20 RedCell program through Amaxra **driving sales performance and focus** for the Modern Desktop replacement of Windows 7 in Microsoft's corporate and education customers. Responsibilities included operationalizing the modern desktop guidance and providing support for sales team goals (FY19 scorecard metrics); landing the business value of a modern desktop with customers through field actions and a shift/change campaign; designing, hiring, and managing a multi-lingual, global service support desk.

Working directly as **advisor to the CEO** of IASA Global (Austin, TX), has established a consulting business model to complement their Architect certifications, exam, and training offerings. IASA works with large retail and pharma clients as they recast their technology architecture teams, focusing on the necessary organizational readiness and transformation of Business and Enterprise Architecture in line with the changing role of technology since business is now digital, and as business controls the spend and direction for future investments. Corporate Account contracts now exceed one million dollars with certification badging just launched using the Acclaim platform integrated with LinkedIn. Designed and delivered recent Academy success with teams from Microsoft Netherlands Customer Success Architects generating follow-on opportunities for CSA team and customer engagements.

A relationship with **IFMA** and **CBRE**, including speaker engagements at the IFMA WW Conference in Denver (October 2015, Phoenix October 2019) and host of the Design for the Experience conference on the Nike Campus (July 2016) focused on workplace strategy. David is a member of the Workplace Evolutionaries (**WE**) leadership, with responsibility for technology in the workplace and networks with worldwide Facility Management thought leaders. Currently writing articles on the return to work (re-occupancy) challenges faced by Facility Managers.

Working with the **SFIA Foundation** on v6 and currently v8 of the skills readiness framework drafting and reviewing several skill areas including Selling (SALE), Client Services Management (CSMG), Change Management (CHMG), Product Management (PROD) and Organisation Design and Implementation (ORDI). The Framework » Category » Subcategory framework and detail descriptions are used the world over by HR groups as the basis for role/level descriptions.

A partnership with John Blackwell and Quora Consulting (UK), as **President of US Operations**, identifying and developing the North America business. The Quora Workplace Excellence Platform, a multi-disciplinary capability modeling tool, ties maturity information and change plans together across Workplace, Technology, Culture and People perspectives. David

spoke at the Smartworking Summit in London, October 2014 and the Facilities Show, London 2017. With his extensive workplace experience, whitepapers, and a decade of research into the changing nature of work to draw on, David and Quora Consulting "exclusively occupy the workplace high ground by bringing together HR, IT, Property and Facility Management in recognition of a common cause."

Contingent business analyst for Value Amplify Consulting Group engaged with Microsoft **developing the Path to Value approach** for sales pipeline development and training for the Data Insights team on value propositions, creating an approach for field sales teams to identify which products and or services to sell; awareness of the Challenger approach to BDM relationship building, Social Selling and Stakeholder Alignment and using stakeholder mapping to identify influencers in large organizations and how to prove value early in the sales cycle so pursuit teams can focus on closing.

As with all professionals, David also delivers pro-bono work, recently for a local cultural center, a Video Content start-up in Seattle, a current democracy app (PinionVote) and contributes to several meetups with East Side startups. David also acts as a Mentor at GLX, a partnership between the University of Washington, Microsoft and Tsinghua University in China.

Microsoft Corporation, Seattle, USA

1996 – August 2014

Senior Director, Worldwide Center of Excellence, Enterprise Strategy Consulting

Seattle, 2011- 2014

Set a strategic challenge to design, hire, and build a worldwide center of excellence for Enterprise Strategy Services to support 500+ Enterprise Architecture engagements. Relocated to Seattle as part of the leadership team with responsibility for hiring, on-boarding, readiness, career development. Success in assessing and growing the capabilities of architects with a special focus on maintaining the culture through an intensive on-boarding "Academy" at the Redmond HQ followed by continuous reinforcement. Trained and certified as Prosci © Change Management Professional, introduced CM as a key solution area for Services.

Goals, over the 3 years, were to grow all aspects of the Enterprise Strategy consulting offer including:

- Achieved overall **awareness and understanding** of a differentiated strategic partnership with Microsoft vs competition
- Established **executive relationships** with 90+ of the largest, global customers
- Organizational readiness to recruit hundreds of professionals into the role aligned with capacity needs
- Delivered as **Chief Instructor** a two-week Academy on advanced consulting, value & outcomes (25 two-week courses)
- Drove engagement above 50% for profession, role readiness and delivery communities
- Hosted two-day Architecture Summit Events, every six months, using an Open Space agenda approach
- Was retained for three years with Key Talent and achievement awards as WW Subject Matter Expert
- Over 1000 staff trained, exceeding all learning objectives

Worldwide Practice Director, Business Strategy Consulting (BSC)

Global role living in the UK, 2005-2011

Selected for an incubation role to investigate and understand the adoption of information-worker products across Microsoft Enterprise customers. Joining as the first member, shaped the BSC offer and team from its inception; as WW leader, converted the team to a paid-for consulting model to establish value and credibility, hiring, training, and mentoring as the team grew to 17, connecting and sharing IP with other groups and partners around the world. Aim was to help largest customers adopt the latest communication, social and collaboration technologies by working with business teams and departments outside of the normal technology relationship (IT, CIO). Working with capability and maturity frameworks, dependency networks and influence models, across both process and unstructured work scenarios so that change was ordered, measured, and aligned with business priorities. Developed new models and methods around value and Scenario NPV, collaborated with facilities in the Workplace Advantage program for Amsterdam, Zurich, and Reading offices, and so able to articulate the interdependencies across people, culture, workplace, and technology, manage to effect, and accelerate successful change and transformation.

Accomplishments during this period in order:

- Defined & executed a business development plan, **drove creation of a five-million-dollar annual consulting business**
- Designed & delivered proven engagement IP and consulting-sales approaches recognized as best in class

- Transferred the team from product group incubation to Services division and established the team as role models for the rejuvenation of the at-scale Enterprise Strategy Business in 2011

Enterprise Strategy Consultant (ESC), Business Development and Industry Marketing Manager 1996-2005

Joined the UK Consulting practice in the first wave of ESC, recruited to provide high level strategic consulting to Microsoft Consulting key accounts. Deployed to deliver strategic reference wins for new technology in target markets, specialized in architecture, deployment and technology management issues and built a solid reputation across Investment and Retail banking in London. Recognized for project management, as well as consultancy and client service expertise. Promoted to Managing Consultant and acted as Practice Director for growing finance sector business. Building on deep industry knowledge and relationships moved first to a Business Development role covering New York and London interworking for twelve months, and then as Industry Marketing Manager for Financial Services. In summary,

- **Developed the services business** from <£100,000 per annum in 1996 to approaching £4million in 2001, including many contracts more than £250,000 delivered by 27 consulting staff
- Finance Sector contribution to the creation of a WW Industry Partner Solutions Strategy (IPSS) with AT Kearney
- **Pioneered** the creation of IP around value, complementing TCO to focus on benefit realization.
- Taught numerous modules and classes covering economic justification (REJ) and capability transformation (MBSA)

Union Bank of Switzerland, London, UK 1991-1996

Chief Technical Architect, Project SERA 1996

UBS embarked on a £1.5 million study staffed jointly with Andersen Consulting to assess the feasibility of a Regional Settlement Platform for UBS. I was the bank's lead on the design team through Use Case analysis supported by Select OMT tools and wrote the technical specifications for a distributed object infrastructure. Responsible for all aspects of end-user computing for Region of Europe; involved in front office, settlement rationalization and re-engineering programs across the Bank with global contribution across Zurich, Chicago, and New York.

Process Design Authority, Project NOAH 1995

For fourteen months, worked on an internal BPR project (£8 million spend with CSC Index). My contribution was to:

- redesign the technology support functions and pilot new processes with 300 front office users
- design and lead laboratory workshops and participate in the selection and introduction of process design tools
- make improvements in the CSC Index meta-model showing the relationships between entities and allowing the automatic creation of role and job guides from the process models
- interview candidates (internal and external) for the newly designed roles
- design and implement new technology systems to support the redesigned processes

ITS Strategy, Assistant Director 1991-1994

For three years, worked as part of the internal Strategy consulting team at UBS. Reporting to the Head of the IT Division, the team was responsible for guiding the bank spend on technology; annual budget of £70 million. After 1993, the team took on wider responsibilities and influenced the direction of all the European operations of the bank. Responsible for the desktop technology strategy for over two thousand staff, comprising traders, office staff and developers. This covered all aspects of the desktop, the LAN infrastructure and server hardware, software packages, development tools and communications infrastructure including mail and collaboration. Accomplishments during this period include:

- established a global workstation strategy for trading divisions that covered both development and deployment
- established trust and working relationships with the London Debt Trading Division so that a medium-term trading strategy for could be formulated and funding secured
- sourcing of desktop supply contracts to a single-source supply strategy
- establishing vendor management and building relationships between UBS and its suppliers
- a full review of IT Services across Europe, including a four-year strategy covering technology requirements
- a review of training and support highlighting the needs of end-users and establishing a business case for investment

- the introduction of an E-Mail and Lotus Notes infrastructure across the region to support various aspects of business (sales and marketing support) and re-engineering (quality and change programs)
- a NeXT workstation pilot to investigate and demonstrate rapid development techniques for trading desks
- established license management to achieve savings and educate against software theft

EUROPEAN COMMISSION, BRUSSELS

1990-1995

Rapporteur and Project Reviewer

First called in January 1990 as an expert in the evaluation of ESPRIT proposals and worked for the European Commission in Brussels. Worked on many occasions for the commission in both the ESPRIT and OMI technology programs and established close links with other European companies who participate in the Commission's program of research funding. In July 1991, member of the selection panel for the ESPRIT '91 Conference papers and acted as the Senior Rapporteur for the commission for four years on the ESPRIT call for proposals. Role of SME in project reviews for several BPR-related projects (Multimedia ATM, Case Processing, and Object Modelling) and helped establish the new focus area of Technologies for Business Processes (ESPRIT-TBP). This program ensured my early exposure to a wide variety of re-engineering projects, methodologies, and tools.

Acorn Computers, Cambridge, UK

1987-1991

Group Product Manager

1989-1991

Asked to take responsibility for all of Acorn's products as manager of the Product Group, a position that I held for two years. The product range (Archimedes, BBC Micro) sold into Home, Education (Primary, Secondary and some Tertiary) and Value-Added market sectors. Two teams (fourteen people) reported to me and I was responsible for product line profitability, product life-cycle control, product support, trend analysis and strategic planning at board level. Acorn's third generation RISC processor was successfully introduced into the product line and marketed with the formation of ARM Limited in 1991. A four-year product plan was developed that was followed to completion with the introduction of a portable computer, a new PC compatible desktop computer and further consumer-oriented products such as Internet terminals and TV set top units.

Product Manager

1988

Established a workstation strategy and launched a range of low-cost high-powered RISC workstations. Responsible for the development of the product, the agreement of its specification within Acorn and parent Olivetti, presentation of marketing plans, promotional campaign, sales channel selection and third-party porting negotiations. Held overall responsibility for the launch of the product at the WHICH computer show in 1989. I formed and led a business unit bringing together all the workstation-related functions including Sales, Marketing and Support. The unit grew to thirteen people and achieved a professional team environment. Over 400 machines sold in the first year resulting in £2.5m of revenue.

Macdonald Dettwiler Technologies Limited, Vancouver, Canada

1983-1988

Software Team Leader

1988

For my last project at MDA, I moved into a customer-oriented role marketing the capabilities of the PC-based workstation systems I had championed within the company. I spent some months with the Indian Space Agency in Bangalore negotiating the transfer of technology and training local developers and users, delivering the first satellite image processing capability.

Project Leader

1983-1987

Developed software for satellite ground-station and image processing systems. Worked extensively with personal computers and workstations, designing, and implementing several image analysis and graphic display workstation systems. Managed the specification, design, and implementation for the IDIAS workstation, based on MIT (X10), for which I won a company award. Led a team of eight software engineers for fifteen months to complete the project ahead of schedule and within budget. IDIAS automated the manual ice analysis and prognosis work for the Canadian Government allowing timely use of airborne and satellite digital imagery for accurate ice condition forecasts in the Arctic and North Atlantic.

EDUCATION

BSc (Hons), Simon Fraser University, Canada, First Class honors in both Math and Computing Science 1983 – 1987

ADDITIONAL INFORMATION

Interests include rugby where he played for Cambridge thirds and then coached; skiing, completing a Canadian Ski Instructor certification, sailing as certified RYA Day Skipper, crewing on boat and yacht deliveries up and down the Pacific Northwest coast and simply cycling to work. David is Secretary of the Bellevue Surrey Downs homeowners Community Club.

David has published articles on Business Value, the future of branch banking, the introduction of technology for Independent Financial Advisors and many years ago, the very early use of satellite imagery to track ice-flows. David is a Fellow of the British Computing Society (FBCS), a Chartered Information Technology Professional (CITP) and a Prosci® Certified Change Practitioner. David recently was certified as CITA-F, Iasa Architect Foundation.

REFERENCES

Stephen Stapleton, Senior Director, Microsoft

Chris Hood, Managing Director, CBRE Workplace Strategy

Contact details on request

Jigish Avalani, ex SVP Concur/SAP

Paul Preiss, CEO, IASA Global