

A little about me

I started studying Electronics Engineering Technology over 30 years ago and quickly realized that I was much better at organizing and disseminating information than I was at designing electric circuits, so I transferred to Technical Writing. I worked in a variety of industries writing manuals and user guides.

As my career progressed, I began to hire others to work with me, eventually forming a consulting company specializing in technical documentation. At its peak I had 15 people working for me. The most rewarding part of running that company was tutoring and mentoring young talent just beginning their career journey.

Then my career began to focus on process and business analysis. These roles share common skill sets: facilitation, influencing, and communicating. Where they differ is in the output, taking in to account its purpose and audience.

IAM (Identity and Access Management) — A good example of this is my work at MUFG, the world's fifth largest financial institution, where I worked with technical and business owners to map a new IAM process required to mitigate a gap triggered by a change in regulatory status. After completing the business process maps and supporting documentation, including a data dictionary, I was asked to create a user guide for the front line IT Security staff. Leveraging my technical communication background, I wrote the user guide from scratch in just two and a half days.

I was also the first person to formally document Rogers Active Directory structure as part of a Sarbanes Oxley (Sox) mitigation program.

For me, a project is about using my various skills to address the task at hand, identifying the sources of information and ownership, the best form of deliverable and influencing acceptance.

Business Change Support Inc.

2007 — present

Sylphia Consulting/Asset Direct [2024]

Project

Asset Direct is a startup FinTech with a large overseas customer and client base. The project involves requirements gathering with significant data visualization and AI components.

Challenges

1. Identify and document gaps in existing API
2. Enable Asset Direct's market growth strategy

Approach

- Study existing API documentation and lead discussions with developers
- Map business processes and document system and data requirements

Toronto Police Services [2023 — 2024]

Project

Replace the existing RMS (Records Management System) and related front-line systems, including updating processes and migrating legacy data and reports.

Challenges

1. Map current state processes, identify gaps and pain points.
2. Identify opportunities to embed updated workflows and procedures directly in the new platform.
3. Map future state process, workflows, and procedures.
4. Support data and report migration.
5. Support new RMS platform implementation, including training and change management communication.

Approach

- Study existing documentation including provincially mandated investigative standards, internal TPS documents
- Job shadow and interview TPS staff
- Attend training sessions in new RMS software
- Create and review relevant process maps and supporting documentation

HOOPP (Healthcare of Ontario Pension Plan) [2022 — 2023]

Project 1

To develop new and update existing business processes and procedure documentation following a major reorganization of PSG (Pension Support Group).

Accomplishments

Delivered new or updated project artifacts including business process maps, business procedures and training decks.

This required facilitating working sessions with key business SMEs, delivering training to business end users and shepherding documents through the approval process.

Project 2

To provide documentation support for PSG's DR (Disaster Recovery) effort in a cloud-based environment.

Accomplishments

Provided input in to cloud-based DR strategy and delivered new or updated DR artifacts.

CIBC (Canadian Imperial Bank of Commerce) [2021 — 2022]

Project

To migrate new and existing users of the Firco Continuity AML Sanctions List Screening application to the latest version of the application.

Accomplishments

Delivered new or updated project artifacts including business process maps, business procedures and training decks.

This required facilitating working sessions with key business SMEs, delivering training to business end users and shepherding documents through the approval process.

BGRS (Brookfield Global Relocation Services) [2020 — 2021]

Project

To define a new TOM (Target Operating Model) that supports changes to an improved Customer Experience and cost reduction, and to provide Business Process Optimization support for new and existing business processes.

Accomplishments

Defined and mapped new business processes to support an improved Customer Experience using Design Thinking, Journey Mapping and industry standard process mapping methodologies.

Created process overview and task guide documentation to support the Learning and Development team in creating meaningful, process task-based learning material for front line learners.

MUFG (Mitsubishi UFJ Financial Group) Canada Branch [2019]

Project

To provide Senior Business Analysis/Architecture support for a Back Office/Information Technology regulatory mitigation program. MUFG is the world's fifth-largest bank with approximately 2.3 trillion dollars in assets under management. The change from being a US subsidiary to a separate branch triggered a change in the Branch's regulatory status.

Accomplishments

Introduced and implemented industry best practice for requirements gathering, business process engineering/mapping and supporting documentation including training and project-tracking artifacts.

Identity and Access Management (IAM) — Solved IAM deficiency, specifying tools, processes and procedures, ensuring alignment with the Bank's overall policies and strategic goals. This involved working closely with the Branch's senior executive, Front Office, Middle Office and Back Office staff.

Greater Toronto Airports Authority (GTAA, Toronto Pearson International Airport) [2017 — 2019]

Project

To provide communication support to the Information Technology Architecture and Planning (ITAP) team. Pearson International Airport is the largest airport in Canada, fourth largest in North America and supports approximately 45,000 workers.

Accomplishments

EAP (Enterprise Architecture and Planning): Supported the TAP EAP lead in creating a set of EA templates for use by internal architects and vendors. These templates lay the foundation of the GTAA's IT architectural standards and describe the GTAA's approach to IT Governance, providing a baseline for measuring any deviation from the current architectural standards.

WiFi Update SoW (Scope of Work): Created a WiFi SoW for the GTAA-wide WiFi update project. The SoW is a legal document that defines the architectural scope of the project and forms the basis of the RFP to external vendors.

RMS (Resource Management System): Delivered Transfer to Operations (TTO) documentation for the deployment of a major backend upgrade to the key suite of systems that are mission critical to running the airport.

BHS (Baggage Handling Systems): Delivered Transfer to Operations (TTO) documentation for Self-Serve Baggage Drop (SSBD) and created data flow diagrams for Baggage Source Messages (BSMs) and Baggage Process Messages (BSMs).

These involved working closely with internal Business Analysts, System Architects, Program and Project Managers, Business leadership, and third-party vendors. It required reviewing various SLA agreements, vendor contracts and existing internal and external documentation.

Royal Bank of Canada (RBC) [2016]

Project

To review and make executive-ready all RBC Global Data Centre PMO Gate documents, Change Requests, and associated artifacts for the global consolidation of RBC's data centres.

Accomplishments

Delivered executive-ready PMO artifacts for the global consolidation of RBC's data centres. This required close interaction with the internal Data Centre teams, PMO program and project leads, and the Migration Centre of Excellence team, leveraging my facilitation and active listening skills to fully understand the messages they were trying to convey to senior management and executives.

Moody's Analytics [2014 — 2015]

Project

To review and make client-ready, business and technical documentation describing a new Non-Retail Credit Risk platform being implemented at one of the major banks in order to meet new Risk Data Aggregation and Risk Reporting regulatory requirements (RDARR).

Accomplishments

Delivered client-ready Functional Specification Documents (FSDs), Release Notes, installation and data transfer instructions (ETL), test cases/reports and Online Help in an Agile development environment. This required close interaction with the internal Business Analysis and Development teams, leveraging my facilitation and active listening skills to fully understand the messages they were trying to convey. This also involved mentoring younger resources.

Automatic Data Processing, Inc. (ADP) [2014]

Project

To assist the Technical Publication team in alleviating a backlog of technical publication deliverables.

Accomplishments

Delivered Business User Guides, Release Notes and Online Help for new and existing Payroll Services and supporting systems, working in both Agile and Waterfall environments. This required rewriting technical specifications/data dictionaries to be more useful to business users.

G4S Secure Solutions [Canada] Ltd. [2012 — 2013]

Project 1

To assist the C-suite executive team in identifying the root causes of year over year gross margin erosion.

Accomplishments

Identified the most significant root causes of margin erosion and developed new Business Processes to mitigate them. This included greater segregation of duties and financial control supporting a new, more centralized, Target Operating Model. This required facilitating process gathering sessions with subject matter experts using six sigma SIPOCs and BPMN 2.0 swim lane diagrams. The improved processes were presented back to the group, securing user buy-in and support.

Project 2

To review the union contract, finance operations' processes and systems to identify any union benefit overpayment.

Accomplishments

Identified approximately \$2,000,000 in potential savings over the life of the contract.

John Hancock/Manulife Financial [2011 — 2012]

Project

To manage, review and approve every future state process for a new line of business (401K, \$10,000,000+), ensuring adherence to mapping standards and established business conventions.

Accomplishments

- Facilitated the successful progression of the project by coordinating the completion and sign-off of over 100 business processes spread over 10 work streams.
- Mentored Business Analysts in understanding six sigma process mapping techniques, standards and conventions as they applied to the business and the project.
- Documented automated workflow and procedures for DST Systems' Automated Workflow Distributor (AWD).
- Brought interactive PDF form production in-house, training and mentoring staff on the basics of desktop publishing and automated data gathering, resulting in savings of approximately \$200,000/year.

TD Wealth Management [2010 — 2011]

Project

To create future state Business Processes to be used with a new Wealth Management Book of Record vendor.

Accomplishments

- Facilitated the successful progression of the project by capturing current and future state processes complete with detailed profiles.
- Facilitated the successful progression of the project by maintaining a Programme-wide process hand-off matrix, ensuring proper input/output documentation.
- Facilitated the training of department staff by developing Six Sigma PowerPoint training presentations.

CIBC [2009]

Project

To document project artifacts for a major upgrade to the Retail Banking branch computer systems.

Accomplishments

- Captured and shepherded business and technical infrastructure requirements through various review cycles to final approval and sign-off within a very short period of time (Windows 2000 to Windows XP at Retail Branches).
- Supported business change by capturing current and future state processes, complete with RACI charts and swim lane diagrams, and performing gap analyses for supporting Testing and Production environments.
- Facilitated review meetings with up to 25 Stakeholders and Subject Matter Experts.
- Liaised with the Corporate Process Management team to vet departmental processes against corporate standards.

Ontario Association of Community Care Access Centres (OACCAC) [2007 — 2008]

Project

To create Business User training material for a new customer management application (CHRIS — Customer Health and Related Information System).

Accomplishments

- Facilitated senior management's understanding of the CHRIS deployment commitment by writing an Executive Planning Guide for Application Deployment, outlining timing and resource requirements that directly impacted service delivery and budget.
- Wrote Manuals, FAQ lists, Feature Bulletins and Training Workbooks that were instrumental in facilitating the product understanding and acceptance of front-line staff.

Rogers Communications Inc. (various business units) [2001 — 2006 non-continuous]

Projects

Various projects for Business Continuity, Disaster Recovery and SOx IT compliance.

Accomplishments

- Mitigated auditable SOx deficiencies by developing best practices within an IT Security/Access Provisioning Group.
- Mitigated auditable deficiencies by documenting and testing Disaster Recovery Plans.
- Mitigated auditable deficiencies by documenting Active Directory IDs including a detailed description of all Network IDs.

Bell Canada Enterprises (BCE) [2004]

Project

To develop a corporate-wide Policy Management Framework as part of a SOx mitigation project.

Accomplishments

Mitigated an auditable SOx deficiency by developing a corporate-wide Policy Management Framework.

Working closely with senior management, executives, internal audit and both internal and external subject matter experts, developed and documented a corporate-wide Policy Management Framework (PM Framework). This required:

- identifying roles and responsibilities for a new Policy Management Group
- standardizing definitions of Policy, Practice and Procedure
- identifying and defining required policy elements
- defining policy sponsors and owners and their respective accountabilities and responsibilities
- creating policy, practice and procedures templates
- developing and documenting a long-term IT strategy for supporting the PM Framework

Previous Consulting

io Consulting Group Inc. [1999 — 2002]

Employed and led a team of 15 resources spread over various projects at different client sites. Recruited, trained, encouraged and empowered them. Monitored their deliverables for accuracy, timeliness and quality.

As the Principle, it was my responsibility to secure new contracts and manage all projects (nine clients totaling approximately \$5,000,000).

DM Gow Communications Inc. [Principle/Senior Technical Writer/Technical Writer: on-site client work] 1986 — 1999

Started my career as a Technical Writer, progressing over time to more senior roles. One of my proudest accomplishments was being the Technical Writer on the team that developed the Fibre Channel standard.

Professional Activities

Simplified Business Architecture Framework

- founding principle

GARP (Global Association of Risk Professionals)

- active member

PRMIA (Professional Risk Managers' International Association)

- active member

Condominium Board of Directors

- past Board member

STC (Society for Technical Communication)

- served as a judge for the Society's International Technical Publication Competition and managed a variety of executive committees, resolving conflicts between committee members and guiding them to successful completion of the committee's goals and objectives

Awards

- Distinguished Chapter Service Award (international recognition)
- Award of Merit, Chapter Newsletter Competition (international recognition)

Application User's Groups (Toronto Chapter)

- founded and ran the chapter's FrameMaker and Ventura Publisher User's Groups, arranging guest speakers, venues and prizes

Education

- 2024 Transport Canada Advanced Drone Pilot License
- 2014 Internal Moody's Analytics courses covering the fundamental principles of Credit Risk
- 2008 ITIL (Information Technology Infrastructure Library) v3 Foundation Certification
- 2008 PMP (Project Management Professional) Power Prep Course, CMF Solutions/ESI
- 1999 Project Planning and Control Seminar, Bates Project Management Inc.
- 1997 Data Modelling Workshop; Process Modelling Workshop; Oracle Essentials for Application Developers; Effective GUI Design, Information Balance Corporation
- 1997 Advanced HTML CGI, The Willcam Group Limited
- 1986 Technical Writing Program, Durham College of Applied Arts and Technology, Oshawa, Ontario
- 1982 — 1984 Electronic Engineering Technology, Algonquin College of Applied Arts and Technology, Ottawa, Ontario