

# William Lucas, PMP

---

**Objective** To be engaged in an environment where I can apply my management and business experience in order to facilitate and contribute to success. In order to add value; implementing change, improving efficiency, and building strong teams with positive attitudes are my goals when aiming to meet and exceed client expectations.

**Professional Strengths** Areas of Focus

## **PROJECT MANAGEMENT OFFICE**

- PMP Certified and in Good Standing
- Strong knowledge of PMP Principles and experience working in large PMO's exceeding 75 project managers.
- Excellent leadership and project management skills as per PMI / PMO diligence
- Program Management Experience

## **SDLC - Software Development Life Cycle**

- Five plus years in software development (SDLC – Software Development Life Cycle)
- 3 years in a highly specialized Financial Institution's Mortgage Division Business Software Development PMO
- 7 years in a highly specialized Enterprise Infrastructure Division of large Canadian Financial Institution
- Expert knowledge of initiating and implementing application driven initiatives in corporate enterprise environments

## **INFRASTRUCTURE – SOFTWARE ENVIRONMENTS**

- Seven years as a Senior Infrastructure Project Manager
- Eight years in enterprise technology infrastructure
- Expert Knowledge of implementing infrastructure driven initiatives in corporate enterprise environments

## **SKILL SET**

- Highly motivated and able to work both independently and as part of a team
- Strong client/vendor negotiation and coordination skills (internal / external business needs)
- Strong strategic thinker; able to deal with complex concepts and issues
- Excellent analytical, problem-solving and organizational skills
- Experienced researcher, with the ability to clearly communicate and present findings
- Diligent and able to work efficiently under pressure and meet deadlines
- Excellent communication skills; both verbal and written

**Experience** November 2<sup>nd</sup>, 2012 to Present NASK LTD  
PMO Manager – Implement Project Management Office: Construction Industry

- Hired to assess and implement a project management office for a small / medium sized construction firm
- Phase 1: Initiate: Assess current business/financial model, operational flow, and client experience
  - Gather requirements for future corporate business model (cost of doing business versus net profit)
  - Gather requirements for future corporate operation model (cost to engage, manufacture, install and deliver)
  - Gather requirements for expected client experience (is there a more effective way to engage clients)

- Define an approach for NASK executives to review and sign off on
- Phase 2: Define, Plan and Execute: Project on-boarding - PMP delivery utilized
  - Actively demonstrate how the five phase PMP methodology will be used moving forward
    - Initiate: gather client requirements and obtain approval to proceed
    - Define and Plan: develop the project plan, sequester resources, build finance tracker
    - Execution: hold kick off meeting, outline project milestones, begin work
    - Control: hold weekly status sessions, report status, financials, issues and risks to executives
    - Close: hold a project implementation review session and provide a closure report to executives
  - Round table sessions held with NASK executives weekly in order to assess the value-add of building a PMO
- Phase 3: Execute: Interview Project Managers
  - Assist NASK Executives with interviewing project managers
  - Mentor the hired PM: knowledge transfer with respect to industry specific project workflow
  - Implement weekly reporting cycle: status, issues, risks, financials, project plan task review
- Phase 4: Oversee and hand-off PMO to NASK Executives
  - Document repository hand-off
  - Provide support consultation

July 2<sup>nd</sup>, – November 2<sup>nd</sup>, 2012 CIBC Technology Infrastructure (Project Delivery Service)  
 Project Manager – First Caribbean International Bank - iCAP Project, On boarding FCIB into  
 CIBC's Integrated Credit Adjudication Platform - PDS Project Management Office

- Assigned to CCT (Credit and Cards Technology, Treasury Risk Management Technology)
  - Phase 1: Organize CIBC shared infrastructure and FCIB environments
    - Gather requirements for local environment builds and feed hub service expansion
    - Gather requirements for First Caribbean feed service into local systems
    - Define approach for FCIB users to connect to CIBC systems via dedicated secured citrix links
  - Phase 2: Environment Build and Configuration Shakedown
    - Establish build requirements and detailed configuration tasks for feedhub and end-state system hosts
    - Ensure that local shared infrastructure has proper SAN storage in order to accommodate new feed data.
    - Track environment expansion in the Caribbean
  - Phase 3: Implementation
    - Track and manage environment expansion in Toronto, Canada
    - Integrate release build with FCIB project managers
  - Phase 4: Production Test and Cutover
    - Coordinate and manage implementation plan with Caribbean and Canadian based resources
    - Ensure that CIBC infrastructure engineers establish and create feed information for ingestion at CIBC via Autosys
- Provide weekly status to senior stakeholders
- Manage, track and update MS Project Plan; feeding them up to an integrated master tracking plan between Application team and business partners in the Caribbean
- Provide MS SharePoint document warehousing support for respective projects

February 5<sup>th</sup>, 2012 – November 2<sup>nd</sup>, 2012 CIBC Technology Infrastructure (Project Delivery Service)  
 Project Manager – Lift Off New York (Repatriation of CIBC's USA Based General Ledger) (\$5MM)  
 PDS Project Management Office

- Assigned to CCT (Credit and Cards Technology, Finance Technology)
  - Phase 1: Organize Source System Providers
    - Gather repatriation requirements from New York General Leger source system providers

- Gather and manage requirements from 3<sup>rd</sup> party vendor HP Canada
- Identify, address both hardware and data related requirements gaps and potential security vulnerabilities
- Define approach for end user desktop decommission and application removals via automated scripting (Altiris)
- Determine what shared infrastructure conflict may occur pre-decom as a result of system shut downs
- Phase 2: Environment Build and Configuration Shakedown
  - Establish build requirements and detailed configuration tasks for feedhub and end-state system hosts
  - Ensure that file systems have enough SAN storage in order to accommodate new feed data.
  - Track environment expansion at HP Canada via HP Project Manager
- Phase 3: Implementation
  - Track and manage environment expansion in Toronto, Canada
- Phase 4: Production Test and Cutover
  - Coordinate and manage implementation plan with USA and Canadian based resources including HP Canada
  - Ensure that CIBC infrastructure engineers establish and create feed information for ingestion at CIBC via Autosys
- Phase 5: Decommission New York Environments
  - Obtain and manage decommission scope for New York based desktop users
  - Coordinate the development of script based decommission process
  - Shared infrastructure decommission of Sybase platform months ahead of original schedule
  - Manage shared infrastructure server decommission
- Provide weekly status to Executive Steering Committees as well as deliver detailed updates to senior stakeholders. Ensure that program director and senior executives are well informed about all issues
- Manage a team of subject matter experts and empower them to become highly effective in their roles by bringing them insightful management information and feedback and by enabling them with professional development
- Manage, track and update MS Project Plan; feeding them up to an integrated master tracking plan between Application team and business partners
- Ensure that timely status sessions are held in order to have project managers and resources report progress
- Provide MS SharePoint document warehousing support for respective projects

May 17<sup>th</sup> 2010, – February 2<sup>nd</sup>, 2012 CIBC Technology Infrastructure (Project Delivery Service)

Technology Program Manager – Risk Strategy Initiatives (\$80MM) PDS Project Management Office

- Technology Operations Program Manager, also managing the technology streams implementing solutions for Treasury Risk Management Technology and Wholesale Banking Technology
- Phase 0: Early Engagement Solution Design and Business Requirements
  - Early engagement sessions with internal clients and external vendor
  - Vendor contract and statement of work detailed reviews
  - Review solution design for:
    - Infrastructure environment builds
    - Network connectivity and security with the UK based vendor
    - Understand amalgamation and reduction of feeds from source systems
    - Review Informatica middle tier reporting engine requirement
    - Proof of concept environment build and execution
    - Review Source System Feed dependencies
  - Establish a high level milestone MS Project plan
  - Joint integration strategy for TRMT, WBT, QA and Technology Operations project plans
    - Identify critical path on each plan
    - Identify critical dependencies between each plan

- Determine “sends and receives” between each plan
  - Reporting and Financials
    - Developed and Report on weekly status decks for all 4 technology streams to senior management
    - Initiate action, issue and risk reporting decks
    - Provide essential communications and escalation paths where and when necessary
    - Execute financial tracking on a weekly basis
    - Track and manage to the technology stream end to end financial budget
- Phase 1: Initiation and Design
  - 4 technology operations build streams identified
    - Infrastructure build (Risk Data Facility)
      - Unix, Intel and VM Server builds, SAN and NAS Allocations, Database Builds
    - Informatica Grid (V9.01) and Middle Tier ARML Conversion Engine
    - Feed development stream
      - (Source to Feedhub and Informatica development)
      - Tidal to Autosys conversion, SFTP encryption tunnels created
    - Network Communication with UK based vendor SunGard
      - Vendor based connectivity between CIBC datacenters and SunGard facilities
      - CIBC United Kingdom data center to SunGard United Kingdom data center oversight
      - Upgrade of CIBC transatlantic WAN to from 45MB to 100MB
      - CIBC user SunGard based Citrix connectivity to SunGard internal systems
  - Resource allocation
    - Request Capital Plan number and transit for hiring
    - Resource Managers “pre kick” off sessions held
    - Critical resources allocated early where possible
    - Program Kickoff session held within technology operations department
    - PM Assignments reviewed
      - Project Manager dedicated to end to end network stream deliverables
      - Project Manager dedicated to
  - Establish weekly status reporting session
    - Network Communication with the UK
    - Technology Operations
    - TRMT Stream
    - WBT Stream
  - Communications and Reporting
    - Provided weekly updates to management
    - Program health check initiated
- Phase 2: Environment Build and Configuration Shakedown
  - Initiated all Intel and Unix server purchases
  - Initiated network communication and security appliance hardware procurement in the UK
  - Preparing SAN and NAS storage allocation requirements
  - The remainder of tasks will be updated as the program proceeds beyond August into 2011.

Dec 1<sup>st</sup>, 2009 – Aug 31<sup>st</sup>, 2010 CIBC Technology Infrastructure (Project Delivery Service)

Project Manager – StorQM / Cold Application Migration to Broadridge New York PDS Project

## Management Office

- Exclusively assigned to CCT (Credit and Cards Technology, Global Operations Finance Technology)
- Phase 1: Organize 10TB of data extraction from CIBC secure systems
  - Establish build requirements and detailed configuration tasks for application specific needs
  - Identify, address both hardware and software related WINTEL security vulnerabilities
- Phase 2: Environment Build and Configuration Shakedown
  - Establish build requirements and detailed configuration tasks for application specific needs
  - Ensure that file systems have been built to application specs and report to the business
- Phase 3: Implementation
  - Establish Weblogic installation requirements and detailed configuration tasks for application specific needs
- Phase 4: Production Test and Cutover
  - Obtain detailed feed information from HP Canada
  - Ensure that CIBC infrastructure engineers establish and create feed information for ingestion at CIBC via Autosys
- Provide weekly status to Executive Steering Committees as well as deliver detailed updates to senior stakeholders. Ensure that program director and senior executives are well informed about all issues
- Manage a team of subject matter experts and empower them to become highly effective in their roles by bringing them insightful management information and feedback and by enabling them with professional development
- Manage, track and update multiple MS Project Plans; feeding them up to an integrated master tracking plan
- Ensure that timely status sessions are held in order to have project managers and resources report progress
- Create, organize and distribute executive presentations, minutes, actions, and issue logs in a timely fashion
- Provide MS SharePoint document warehousing support for respective projects

Sept 1<sup>st</sup>, 2009 – Aug 31<sup>st</sup>, 2010 CIBC Technology Infrastructure (Project Delivery Service)

Project Manager – Pegasus Project, PDS Project Management Office

- Exclusively assigned to CCT (Credit and Cards Technology)
- Deliverable to migrate the Halifax Reporting Center Functionality to Montreal
  - Fork lift Intel and Unix servers, Fax Machines, Printers, Scanners
  - Re-Direct Fax Lines to Montreal, Decommission old Fax lines and remaining Telephony
  - Remove Server Racks and Cabling
- Phase 1: Server and Fax Fork Lift
  - Establish build requirements and detailed configuration tasks for application specific needs
  - Identify, address both hardware and software related WINTEL security vulnerabilities
- Phase 2: Environment Build and Configuration Shakedown
  - Establish build requirements and detailed configuration tasks for application specific needs
  - Ensure that file systems have been built to application specs and report to the business
- Phase 3: Decommission Halifax Environment / Remove Server Racks and Cabling in Halifax
  - Establish Weblogic installation requirements and detailed configuration tasks for application specific needs
- Phase 4: Production Test and Cutover of Montreal Reporting Center
  - Obtain detailed feed information from HP Canada
  - Ensure that CIBC infrastructure engineers establish and create feed information for ingestion at CIBC via Autosys
- Provide weekly status to Executive Steering Committees as well as deliver detailed updates to senior stakeholders. Ensure that program director and senior executives are well informed about all issues
- Manage a team of subject matter experts and empower them to become highly effective in their roles by bringing them insightful management information and feedback and by enabling them with professional development
- Manage, track and update multiple MS Project Plans; feeding them up to an integrated master tracking plan
- Ensure that timely status sessions are held in order to have project managers and resources report progress

- Create, organize and distribute executive presentations, minutes, actions, and issue logs in a timely fashion
- Provide MS SharePoint document warehousing support for respective projects

September 1<sup>st</sup>, 2009– January 11<sup>th</sup>, 2010 CIBC Technology Infrastructure (Project Delivery Service)

Project Manager – iCAP / MRA Repatriation PDS Project Management Office

- Exclusively assigned to CCT (Credit and Cards Technology)
- Phase 1: Intel - Windows Virtual Server Environment Build / Unix Server Builds and Database Builds
  - Establish build requirements and detailed configuration tasks for application specific needs
  - Identify, address both hardware and software related WINTEL security vulnerabilities
  - Ensure that the new CIBC infrastructure is built, configured and optimized to run the repatriated application
- Phase 2: Data Base – Oracle Data Base builds
  - Establish build requirements and detailed configuration tasks for application specific needs
  - Ensure that file systems have been built to application specs and report to the business
- Phase 3: Middleware Build and Unix Configuration
  - Establish Weblogic installation requirements and detailed configuration tasks for application specific needs
- Phase 4: Feed Repatriation from Hewlett Packard’s Enterprise Infrastructure
  - Obtain detailed feed information from HP Canada
  - Ensure that CIBC infrastructure engineers establish and create feed information for ingestion at CIBC via Autosys
- Provide weekly status to Executive Steering Committees as well as deliver detailed updates to senior stakeholders. Ensure that program director and senior executives are well informed about all issues
- Manage a team of subject matter experts and empower them to become highly effective in their roles by bringing them insightful management information and feedback and by enabling them with professional development
- Manage, track and update multiple MS Project Plans; feeding them up to an integrated master tracking plan
- Ensure that timely status sessions are held in order to have project managers and resources report progress
- Create, organize and distribute executive presentations, minutes, actions, and issue logs in a timely fashion

Provide MS SharePoint document warehousing support for respective projects

May 1<sup>st</sup>, 2009– August 31<sup>st</sup>2009 CIBC Technology Infrastructure (Project Delivery Service)

Project Manager – Credential Storage Project - ISRM (\$14MM) Project Management Office

- Exclusively assigned to Infrastructure Security Program (ISRM- (Infrastructure Security Risk Management)
- Phase 1: Privileged ID/Credential Storage Secure Repository Infrastructure Build Project Manager
- Intel - Windows Service Pack 2 Security Upgrade Program Manager
  - Identify, address both hardware and software related WINTEL security vulnerabilities
- Provide weekly status to Executive Steering Committees as well as deliver detailed updates to senior stakeholders. Ensure that program director and senior executives are well informed about all issues
- Manage a team of subject matter experts and empower them to become highly effective in their roles by bringing them insightful management information and feedback and by enabling them with professional development
- Manage, track and update multiple MS Project Plans; feeding them up to an integrated master tracking plan
- Ensure that timely status sessions are held in order to have project managers and resources report progress
- Create, organize and distribute executive presentations, minutes, actions, and issue logs in a timely fashion
- Provide MS SharePoint document warehousing support for respective projects

March 2007– April 31<sup>st</sup>, 2009 CIBC Technology Infrastructure (Project Delivery Service)

Project Manager – Currency Capacity and Refresh Program CCR – Project Management Office

- Exclusively assigned to Currency Capacity and Refresh Program (CIBC Core Infrastructure Initiative)
- Database, Application and Middleware Program Manager and Project Specialist
- Intel - Windows Service Pack 2 Security Upgrade Program Manager
  - Identify, address both hardware and software related WINTEL security vulnerabilities
  - Create, plan and solution to resolve these vulnerabilities on 700 Core CIBC infrastructure Intel servers
  - Met and exceeded Corporate Enterprise Security and Quality Management Program Completion requirement deadlines
- Informatica Version 8.6 Currency Program Manager
  - Collaborate with Unix and Global Application Middleware Engineers to develop Enterprise wide rollout plan
  - Tactically and strategically negotiate with more than 16 Lines of Business (Bank Clients), in order to ingest over 50 applications into the new Informatica Version 8 environment
- Weblogic Currency Program – upgrade to version 10
- Oracle Currency Program – upgrade to version 10G R2
  - Develop 4 project plans which in turn feed one master Oracle program Microsoft project plan
  - Logically aligned 4 core infrastructure environments which grouped lines of business
  - Collaborate UNIX, Storage, Network, and Middleware engineers in order to coordinate environment upgrades
  - Negotiate with more than 16 lines of business and over 100 application owners in order to ingest migration release plans
  - Sybase – upgrading the CIBC Sybase Farm to version 12.5.3
  - ECC EMC – CIBC Storage Monitoring and Performance infrastructure build
  - Oracle Grid Control - Oracle Database Monitoring and Performance Program Manager
  - Microsoft SQL Program – Upgrade the CIBC SQL Servers to SQL 2K SP4 or 2K5
- Applied Project Management Methodology throughout all project phases (initiation, planning, execution, controlling, closing) including:
  - Develop and publish Business Case/ Order Of Magnitude (OOM) / High Level Estimate (HLE)
  - Prepare Project Charters as well as preparation and present them for executive approval
  - Create Work Breakdown Structures and Project Plans
  - Maintain and update monthly status reports and Communications Strategy
  - Continuously monitor Project Milestones
  - Project priorities re-assignment, if necessary, to maintain project schedule
  - Document and publish project meeting minutes, with issue logs, action items, and resolution
  - Assess and develop Risk management plans and strategies where applicable
  - Manipulate Escalation process and Change Management Process in order to benefit programs
  - Vendor Management and Procurement Management
  - Provide high level Project Financials and Latest Estimates where applicable
- Provide weekly status to Executive Steering Committees as well as deliver detailed updates to senior stakeholders. Ensure that program director and senior executives are well informed about all issues
- Manage a team of subject matter experts and empower them to become highly effective in their roles by bringing them insightful management information and feedback and by enabling them with professional development
- Manage, track and update multiple MS Project Plans; feeding them up to an integrated master tracking plan
- Ensure that timely status sessions are held in order to have project managers and resources report progress
- Create, organize and distribute executive presentations, minutes, actions, and issue logs in a timely fashion
- Provide MS SharePoint document warehousing support for respective projects

June 2005–March 2007 CIBC Technology Infrastructure (Project Delivery Service).

Project Manager – BASEL Program – (\$300MM) Project Management Office

- Exclusively assigned to BASEL projects (Regulatory Initiative) (\$300MM + initiative)
- Most expansive project in my portfolio (Retail Credit Data Warehouse) exceeds 20 resources and a 75MM budget
- Applied Project Management Methodology throughout all project phases (initiation, planning, execution, controlling, closing) including
  - Created Business Case/ Order Of Magnitude (OOM) / High Level Estimate (HLE)
  - Created Project Charters for presentation and approval
  - Created Work Breakdown Structures and Project Plans
  - Evaluated and addressed monthly status reports and Communications Strategy
  - Continuously monitored Project milestones
  - Evaluated project priorities for re-assignment, if necessary, to maintain project schedule
  - Created and distributed project meeting minutes, with issue logs, action items, and resolution
  - Evaluated and developed risk management assessment and risk strategies where applicable
  - Manipulate and develop escalation and change management process in order to benefit programs
  - Effectively dealt with Vendor Management and Procurement Management
  - Provided high level Project Financials and Latest Estimates
- Provide weekly status to Executive Steering Committees as well as deliver detailed updates to senior stakeholders. Ensure that program director and senior executives are well informed about all issues
- Ensure that PMP standards and principles are met where applicable and where possible
- Assist with and manage creation of standard PMP documentation and reporting materials
- Manage, track and update multiple MS Project Plans; feeding them up to an integrated master tracking plan
- Ensure that timely status sessions are held in order to have project managers and resources report progress
- Create, organize and distribute executive presentations, minutes, actions, and issue logs in a timely fashion
- Provide MS SharePoint document warehousing support for respective projects
- Manage a team of subject matter experts and empower them to become highly effective in their roles by bringing them insightful management information and feedback and by enabling them with professional development

July 2003–May 2005 CIBC Mortgages Inc.

Project Control Manager – (\$40MM) Project Management Office

- Integrated Lending Platform (ILP) Project Control Officer (\$40MM + initiative)
- Ensured that PMO / PMP standards and principles are met where applicable (phased delivery)
- Assisted and managed creation of Order of Magnitude documents, Program Charter, and Project Spend Reports
- Manage, track and update 14+ Microsoft Project Plans; integrate them into a master tracking plan
- Program Administrator for ClearCase, document version and warehousing tool
- Create, organize and distribute executive presentations, minutes, actions, and issue logs in a timely fashion
- Maintain, organize, and assist in the creation of both status and executive steering committee meetings
- Ensure that program director and project managers are well informed about all issues



*March 2001–Oct 2001 Promobility Inc.*

Project Manager – Project Management Office

- Provide work breakdown structure and plan for store development, build and operations date
- Manage design, implementation, construction and operation of Markham Retail Storefront for 6 months
- General Manager of Operations at Scarborough satellite location through warranty period
- Liaising with Rogers AT&T corporate on a weekly basis with respect to marketing, sales, and campaign offers
- Responsible for financial reporting to Promobility upper management
- Strong understanding of dynamics demands and experience working with businesses that have tight deadlines.
- Negotiating and coordinating with internal and external clients.
- Helping to build, and motivate teams that deliver results on time and on budget
- Using effective oral and written communications skills to build and maintain excellent customer relationships, facilitate effective meetings and deliver successful presentations.

*Dec 1998–March 2001 Toronto Police Service (T.P.S)*

Intermediate Network Analyst - Project Management Office

- Project Team Lead on various network upgrade initiatives and new service wide initiatives
- Assist in designing, implementing, managing and supporting the T.P.S. network infrastructure
- Program hubs, routers, and switches, as well as monitor and keep statistics on usage patterns
- Perform pre-site management for future expansion, and quality control as well as support cabling infrastructure
- Provide end user the technical know-how to efficiently and effectively utilize T.P.S. communication technology
- Designed, built and managed Y2K fail-over test environment (hardware and software)
- Completed IBM Introduction to AIX 4.0 Firewall Course, working knowledge of network analysis utilities
- Working knowledge of 3COM hubs, Baystack, Cisco, and Nortel Switches
- Troubleshoot software, physical network and board-level failures

*April 1997–Dec 1998 Toronto Police Service (T.P.S)*

IT Customer Service Representative

- Provide both technical and end user support for computers in all Toronto Police Service Divisions
- Project Team Lead in the management and rollout of Windows NT4.0 on approximately 3500 workstations
- Executed and managed training seminars and presentations for T.P.S. staff
- Perform service requests across the organization (hardware installations, configure network workstations)
- Coordinate and manage network mainframe changes
- Provide service on site, as well as over the phone with end users
- Manage notebook resources, presentation devices, and software applications

Education	1990–1991	<u>University of Toronto</u>	Toronto, ON
		▪ Department of Geological Engineering	
	1992–1996	<u>York University</u>	Toronto, ON
		▪ Specialized Major Double Honours B.A. Degree, Department of Geography	
		▪ Specialized Honours B.A. Thesis completed	
		▪ Thesis successfully defended and University published	
		▪ Top of Class achievement award and recognition in Process Geomorphology	

- Top of Class achievement recognition in Statistics

Certification *Project Management Institute (www.pmi.org)*

- & Course  
Achievements
- PMP Certified (in good standing)
  - University of Toronto PMP Certification Training
    - Course instructor: Tim Rudkins