Change Expert · ProSci-Certified · Workplace & Program Design

PROFILE

ProSci-certified change management professional and Illinois notary (traditional and electronic) with 20+ years of experience in process design, project management, IT initiatives, logistics, and boutique B2B services for affluent and elite clients. Known for translating complex, cross-functional change into clear programs, workflows, and experiences that real people adopt and sustain.

KEY EXPERIENCE - BMO FINANCIAL GROUP

Workplace Transformation - Office Space & Technology

Partnered with Workplace and Technology leadership on BMO's Workplace Transformation program, supporting the design, execution, and change management of office spaces in Toronto, Milwaukee, Brookfield, Chicago, Naperville, and Scarborough. Helped align space, technology, and behavioral change so teams could work effectively in new, future-ready environments.

Cloud & Collaboration Modernization - M365 & Telephony

Guided business units through the shift from paper-intensive processes to cloud-first ways of working using OneDrive and SharePoint. Supported the move from legacy copper-wire telephony to fully integrated platforms including Cisco, Avaya / One-X, Skype for Business, and ultimately Microsoft Teams. Trained thousands of employees across the U.S. and Canada on collaboration tools, driving adoption of modern solutions at every step.

M&I Integration - Technology Finance & Asset Deployment

Supported the integration of M&I in a technology finance capacity, assisting with project-based procurement, deployment, and lifecycle management of hardware, software, and labor assets. Helped ensure frontline teams had the tools they needed while staying aligned with budgets, standards, and timelines.

Bank of the West Integration - Branch Technology Experience

Played a key role in integrating Bank of the West branches into BMO's technology ecosystem. Supported requirements gathering and initial testing of new peripherals such as receipt printers, check scanners, and PIN pads. Helped design and run a pilot program across select branches, capturing feedback and lessons learned before scaling the solution to nearly 500 locations.

Walk a Mile - Branch Advocacy & Feedback Program

Conceived and built the Walk a Mile program from the ground up after leadership identified a need for structured branch visits. Designed all core elements, including processes, procedures, roles and responsibilities, tools and trackers, forms, communication templates, and feedback loops. Created a repeatable framework that allows technology teams to observe branch experiences firsthand, capture issues, and drive faster, higher-quality resolutions.

CORE COMPETENCIES

- Change Management (ProSci)
- Process & Workflow Design
- IT & Workplace Tech Initiatives
- Program & Project Management
- Stakeholder Engagement & Training

- Logistics & Operations
- Boutique B2B Services
- Client Experience & Service Design
- Entrepreneurial Ventures
- Transportation & Concierge Services

VENTURES & INITIATIVES

Mosaic Strategies Inc. - Founder

S-Corp holding company for consulting, experimentation, and boutique services at the intersection of change, technology, logistics, and high-trust client relationships.

Tessera · Concierge Notary (Illinois)

Premium notary service for affluent and exclusive clients in Illinois, offering discreet, punctual, white-glove support for critical documents while creating opportunities for vetted side-hustle notaries.

Rosehill Moto · In Development

Concierge seasonal storage concept for motorcycles and rare, custom, specialty, and enthusiast cars in Chicago — combining logistics, client experience, and a deep passion for machines.

EDUCATION & CREDENTIALS

DePaul University – Bachelor's degree in Information Systems Analysis

Coursework and projects focused on systems analysis, requirements gathering, and technology-enabled business solutions. **Certifications**, project details, and references available on request or via LinkedIn.

• ProSci Change Management Certification • Illinois Notary Public - Traditional and Electronic (eNotary)

SELECTED SKILLS & TOOLS