

PHILLIP GORDON
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Summary: Ability to relate technology trends to business opportunities
Experience in enterprise wide strategic planning
In-depth knowledge of current and emerging technologies
Experience in planning for and implementing new technologies

Professional Profile

Management

25 years experience in information technology, with roles including CIO, Director of IT, consultant, architect, project manager, systems analyst, and programmer.

Worked in heavy construction, banking, retail discount brokerage, and mutual funds, including dealing with global subsidiaries and remote offices.

Served as a first and second level manager, and reported directly to a CIO.

Budget responsibility for entire IT career, and considerable experience in stringent cost control, including outsourcing.

Formed technical groups with a strong team spirit, worked effectively with peers in IT, across all business functions, and at all corporate levels, including executive management.

Superb communicator with skills honed by many years of writing for IT journals, teaching IT subjects, and giving presentations. Write for, consulted by, and quoted in many industry journals on a variety of IT issues, including *InformationWeek*, *Computerworld*, *CIO*, *BusinessWeek*, *Information Management & Consulting*.

Strategy & Technology

Experience working with business partners to develop technology strategies aligned with business objectives, identify new technologies and match them to business needs, deliver technology solutions on time and within budget, and manage risk and change.

Internet experience since 1996, helping companies think about the Internet, create strategies, and integrate the Internet into their businesses.

Experience in business process analysis and redesign for improved workflow, increased productivity, enhanced service, and lowered costs.

Experience in IT strategy, planning, and process redesign.

Experience in aggressive use of technology to support development of innovative products.

Responsible for introducing emerging technologies: Internet/Intranet, mobile computing, collaboration, document management, PCs, LANs, Windows, email, data warehousing, client/server.

Project Management

Experience teaching, introducing, and optimizing project management processes and disciplines, including: MS Project, SDLC, RUP, version control, QA, estimating, requirements analysis, cost/benefit analysis and budgeting, risk and issue management, change management, and management reporting.

Managed teams of developers working on multiple projects, including large, complex, multi-phase projects. Managed employees, contractors, and consultants, including remote and offshore teams. Worked effectively on matrix-managed projects.

Experience in "build vs. buy" decisions, vendor negotiations, and contract management.

Experience in systems design, development, and maintenance on a variety of platforms, systems and legacy integration, data networking, LANs and WANs. Some experience with telecommunications, systems operation and management (24/7), and direct customer support.

Experience creating, designing, and implementing collaborative systems, and optimizing processes to create more effective teams.

Experience creating, designing, and managing data warehouses, and making them effective management tools for marketing, customer and product analysis, and service.

Professional Experience

Independent consultant, 9/1999 - present

- **Advisory Board Member, 2000 – present.** Consult with Internet startups on business and technology strategy. I Do Foundation (www.idofoundation.org), SeekNet Technologies (Assets acquired by Tribal Fusion Apr2005), Summa Consulting (www.summaconsulting.com).
- **Web Strategy Consultant, 10/1999 - present.** Analysis for a group of companies trying to understand how to Web enable their ERP systems. Consult with a group of the largest retailers in Norway on success factors for creating a Web channel. Consult on strategy, business processes, architecture, and design of a B2B site for selling wine overstock.
- **Contract Project Manager, Kaiser Permanente, 11/2005 – present.** Manage initiative to redesign operating model, business and IT processes, and architecture for www.kp.org.
- **Contract Project Manager, Wells Fargo Bank, NA, 7/2002 – 11/2005.** Manage changes mandated by Federal Reserve Board to all consumer credit systems, including wells Fargo.com; Manage choice and implementation of an enterprise records management solution.
- **Internet Development Manager, Learning Network, 2/2000 - 8/2000.** Manage four groups of developers creating education-related sites and a major education portal for the dot.com subsidiary of the Pearson global media companies.
- **Executive Director, Fisher Center for IT and Marketplace Transformation, Haas School of Business, UC - Berkeley, 10/2000 – 6/2002.**
 - Started an Enabling eBusiness program and organized a very successful conference series.
 - Technical advisor to three Haas student Internet startups.
 - Lecturer appointment in Management & IT Group at Haas since 8/2000; teach Planning & Design of eBusiness Systems (undergraduate), Enabling eBusiness Transformation (MBA).
- **Adjunct Professor, Mills Graduate School of Business MBA Program, 1/2004 - present.** Teach Management Information Systems.

E*Trade Group, Inc., 6/1999 – 9/1999

Director & CIO, Investment Banking and Mutual Funds, Responsible for developing, enhancing, and maintaining systems to support creation and online delivery of mutual fund and investment banking products and services to E*Trade customers. Launch three new proprietary funds, including necessary system changes to support launch of others. Migrate IPO Center to standard architecture, improving stability and customer experience. Consultant to team integrating their online investment bank with core brokerage systems.

Franklin Resources, Inc., 7/1995- 5/1999

Supported growth in assets under management from \$150 to \$218 billion.

Enterprise Architect, 6/1998-5/1999. Responsible for developing strategy; integrating technologies; publishing standards; guiding integrated systems architectural design. Architect for ERP project implementing PeopleSoft financials and HR modules. Architect for executive management portal integrating all major corporate systems.

Interim head of Application Development, 5/1997-1/1998. Developed FY 1998 strategy, objectives, and budget.

Chief of Staff to the CIO, 5/1997-5/1998. Standardized and optimized contract review and administration, purchasing, and invoicing processes and procedures. Reduced the number of contracting suppliers significantly and negotiated lower rates with remaining preferred agencies. Improved management financial reporting and tightened financial controls. Created a Program Management function, centralized project reporting and tracking. Improved internal communication and public relations. Researched metrics, selected business value measures, and improved executive reporting.

Systems Architect, 7/1995 - 12/1997. Managed six departments. Developed an enterprise Internet strategy and implemented all U.S. Web sites, including first Franklin Templeton Fund Group site. Initiated and managed the Year 2000 project. Developed an Information Systems Plan (computing architecture, standard platforms, tools, and development methodologies). Selected and implemented SDLC, testing methodology, business and data modeling tools. Implemented Lotus Notes worldwide and made it an effective tool for collaboration and project management. Implemented a nationwide imaging/workflow system designed to enhance customer service and improve productivity. Created first DBA group. Selected and implemented IBM MQSeries middleware to allow transaction posting to mainframe shareholder system from VAX, NetWare, RS/6000, NT, providing significantly enhanced customer service. Selected and implemented enterprise reporting tool (Actuate).

Charles Schwab & Co., Inc. 12/1986 – 7/1995

Supported growth in revenue from \$267M in 1988 to \$1.4B in 1995, accounts from 1.2M in 1988 to 3.4M in 1995.

Director of MIS & IT for the back office division, 12/1993-7/1995. Built the IT organization and provided business process consulting and client/server solutions, resulting in improved workflow, increased productivity, enhanced service, and lowered costs. Designed and implemented a PC-based system to control risk during volatile markets; a voice response system to service and track customers tendering shares for corporate reorganizations; and a number of keyboard automation systems to enter mainframe data, freeing FTE for value-added processes. Managed a project to integrate 500 NT workstations.

Various IT positions, 12/1986-11/1993. Designed and implemented critical management information and operational processes required for launch of OneSource mutual fund product, No-fee IRA, several Schwab funds. Managed corporate data warehouse. Design architecture for enterprise-wide decision support, design prototype to provide "proof of concept," select UNIX-based RDBMS, DSS and EIS products. Key member of task force designing enterprise distributed data architecture and strategy. Design client/server system to track, price, and reconcile \$19 billion in proprietary Schwab mutual funds. Choose email software and implement national email network. Chair committee that developed Schwab LAN strategy and selected LAN hardware and network operating system. Implemented first LANs throughout Schwab and provided key resources for design and launch of Schwab's Metropolitan Area Network. Successfully outsourced PC support hotline.

Independent Consultant, 4/1985 – 12/1986

Consultant, 4/1985 – 12/1986. Design and develop an Rbase application to survey skills of Federal telecommunication workers. Systems integrator for food wholesaler reengineering from one site multi-user system to 11 warehouses, multi-state business system.

Instructor, Cañada College, 9/1985 – 12/1985. Teach, develop curriculum. Advise on purchase of micro and Office Automation hardware and software. Guide staff in use of computers. Consultant to Training & Management Institute. Install a network of PCs attached to S/36 and serve as System Administrator. Design, develop, and implement dBase system to track attendance in Typing Labs. Serve as PROFS technical support.

Crocker National Bank, 9/1983 – 8/1985

Manager, Micro & Office Systems, 8/1984 – 8/1985. Reorganize group to provide better service. Establish first EUC strategy for Crocker. Manage survey of Crocker and Midland Bank international business. Reengineer microcomputer purchasing process, significantly reducing expenses.

Manager, Micro Interface Support, 5/1984 – 7/1984. Manage two departments. Support end user computing and provide systems programming services for 3033, PDPs, and VAX. Consultant to bank wide study on strategic information systems. Establish and implement micro-mainframe products and procedures. Consultant to task force establishing bank wide building wiring strategy.

Senior Systems Analyst, 9/1983 – 4/1984. Assist in installation of VM/SP and CMS on IBM mainframe, including providing EXECs, XEDIT macros, and SCRIPT profiles. Train users, other Analysts in VM/SP, XEDIT. Responsible for all aspects of micro-mainframe communications.

Working Environments

LANGUAGES: BASIC, COBOL, REXX, JCL, Visual BASIC, HTML, XML, Javascript, Java

HARDWARE: DEC VAX, ROLM CBX II 8000/9000, ROLM 9751, IBM 30XX, IBM AS/400, IBM RS/6000, Sun workstations and servers, Dell/Compaq servers, fax servers, PCs, Macs, laptops, palmtops, PDAs

NETWORK: X.25, TCP/IP, 3270, Novell Netware, systems and network management (Cabletron Spectrum, H-P OpenView, SNMP), AppleTalk, token ring and ethernet LAN, Cabletron hubs, cisco routers, modems, WiFi

OPERATING SYSTEMS: VMS, VM/SP, CMS, MVS/TSO, CICS, UNIX, Solaris, Linux, OS/2, Mac OS, Windows 95/NT/2000/XP

SOFTWARE: SCRIPT, XEDIT, ISPF, CASE (HPS, Bachman, ErWin, SilverRun), PC/Mac software (word processing, graphics, presentation, spreadsheet, desktop publishing, communications, project management, expert systems), DBMS (Focus, Nomad, dBase, Rbase, Paradox, Microsoft SQL Server and Access, Sybase, Oracle), various vertical applications (legal client management, HR, portfolio management, contact management, etc.), Business Intelligence (SAS, SAS/Graph, Cognos, Holos, Crystal Reports, Actuate Enterprise Report Server), Netscape Enterprise Internet Server, Microsoft IIS, Apache Web Server, Netscape Application Server (Kiva), Visual Café, BEA WebLogic, Vignette StoryServer

COLLABORATION TOOLS: email (PROFS, Outlook, Exchange), document management and workflow, Lotus Notes, NetMeeting, instant messaging

DISTRIBUTED SYSTEMS: DCE, Transarc Encina, Tivoli, IBM MQSeries, BEA Tuxedo

Education

B.S.	Animal Science	Rutgers University
Ph.C.	Genetics	Univ. of California-Berkeley
M.S.	Zoology	Rutgers University

Advanced Training:

- Strategic Planning
- Thinking & Managing Strategically
- Exceptional Management Practices
- Managing Organizational Change
- Implementing Accelerated Change
- Enterprise Email Integration
- Planning & Implementing IT Metrics Processes

International:

Travel to Europe, Central America, Japan, India