

# Peter S. Milsom

CMC, PRINCE2 Practnr., PMP, ITIL Manager, MSP Adv. Practnr..., PPS, P3O, M\_o\_R Practnr., COBIT, DSDM Atern, CITAM, CSM

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## Accredited Programme & Project Executive / Management Consultant / Accredited Senior IT Service Manager

Security Clearance: Canadian Government Secret (#95-11-3009, Expires: 2018-11-17)

### PROFESSIONAL SUMMARY

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Mr. Milsom is a programme / operational project executive and executive management consultant with experience managing and consulting in Information Management and Technology (IM/IT) engagements throughout North America that range from short term and non-complex to large-scale multi-project / multi-year highly complex and challenging environments. Over Mr. Milsom's 22+ year career in the IM / IT field he has held a diverse variety of positions in different technical fields, providing a broad understanding of the IM / IT arena:

- Strategic Advisor (PM/IT/ITAM)
- Chief Technical Architect
- Senior Technical Advisor & Architect
- Senior IT Service Manager
- Help Desk Manager
- IT Asset Manager
- Local Area Network Manager
- Project Management Auditor
- Development & Test/QA Manager
- Corporate Trainer
- Senior Systems Architect
- Senior Systems Analyst

Combined with this, Mr. Milsom has taken on progressively more demanding management and leadership roles as illustrated by the following positions:

- Programme / Project Executive
- Executive Management Consultant
- Project Management Advisor
- Project & Programme Manager
- President / CEO / Chief Project Officer (for a multi-million dollar consulting services and solution development corporation)
- VP Product Management / International Consulting / Methodology
- Founding & Managing Partner

Mr. Milsom combines strong capabilities in the following IM / IT areas: strategy, analysis, policy, architecture, infrastructure, QA, and managed services; as well as superior HR management, facilitation, and communication skills with a proven track record of successfully meeting deliverables and managing priorities. Mr. Milsom has been engaged by clients to help establish programmes in challenging new organizations and / or to rescue programmes / projects to bring them back on track and to a successful conclusion. Mr. Milsom has extensive experience and success working with and building effective and motivated project teams, and working through personality, language and cultural issues.

### SUMMARY OF AREAS OF EXPERTISE

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- **Programme / Project Management:** proven track record of turning troubled change management initiatives around
- **Management Consulting:** proven approach to the strategic planning and advice, analysis, design, development, communication and marketing, and timely delivery of mission-critical projects
- **IT Asset Management:** proven track record of conducting baseline assessments for all of IT Asset Management, and architecting go forward strategies and implementation plans
- **Change Management:** successfully designing and implementing policies, processes, procedures and systems to allow clients to effectively transition projects to operational status and realizing the anticipated business benefits
- **IT Service Management:** successfully turning around service disciplines and increasing business value and service
- **Facilitation:** extensive experience dealing at a senior level implementing successful global enterprise solutions

### SUMMARY OF EXPERIENCE

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- IM / IT management consulting services and business process re-engineering – 22+ years
- Operational programme / project management – 17+ years
- Experience working with the Government of Canada on E-Government IM / IT Engagements – 15+ years
- Management of large programmes / projects (over 24 months, nationwide / international, and \$15M+) – 9+ years
- Implementing and running PMOs – 10+ years
- Managing Projects with PRINCE2 – 6+ years
- Conducting Programme / Project Management Maturity Audits (including OPM3 / P3M3 / P2MM) – 5+ years
- Knowledge management, document management, groupware and messaging – 13 years

Mr. Milsom's experience and expertise allows him to offer effective services in the following areas:

### **Programme / Project Management (Audit)**

- Extensive and highly successful experience turning mission critical troubled projects around and fully delivering anticipated benefits at clients sites such as: PMO, PWGSC, IBM Global Services, Stentor, Mitel, Canada Post, EC
- Have utilized the Project Management Institute's (PMI's) Organizational Project Management Maturity Model (OPM3) to conduct organizational assessments to identify the level of maturity of an organization in Portfolio, Programme, and Project management
- Have utilized the Office of Government Commerce (OGC) P3M3 (Portfolio, Programme & Project Management Maturity Model) as an aid in conducting organizational assessments to identify the level of maturity of an organization in Portfolio, Programme, and Project management and to make continuous improvement recommendations
- Utilizing OPM3 and P3M3, have conducted GAP analyses to identify what areas within organizations are low on the maturity scale and what areas are established within the organization. For those areas identified as non-existent or need to be established, have used OPM3 to map out a future path for mapping the interdependencies of capabilities to best practices
- Establishing and Running Programme / Project Management Offices (PMO)
- Utilized the OGC PRINCE2 methodology on a number of mission critical projects
- Utilized the OGC MSP methodology on a number of mission critical Programmes
- Utilized the OGC Management of Risk (M\_o\_R) to manage risks for a number of mission critical engagements
- Project Integration, Scope, Time, Cost, Quality, Effort Prioritization, Human Resource, Communications and Risk Management for Software Development and other IM / IT Engagements
- Consultant and Software Contract Management

### **Methodologies / Frameworks / Libraries**

- Bate Project Management Methodology (Certified)
- Capability Maturity Model (CMM)
- CoBIT v4.1
- DMR Productivity Plus (DMR P+ Certified)
- DSDM Atern (Certified)
- IBM Accelerated Value Method (AVM) for collaborative distributed development (Certified)
- ITIL Master v2.0 (Certified)
- ISO 20000
- Joint Application Development (JAD)
- Management of Risk (M\_o\_R) 2007 (Certified)
- Merise Methodology
- Method / 1
- Microsoft Operations Framework v3.0 & 4.0 (MOF)
- PMBOK Standard versions 2<sup>nd</sup>, 3<sup>rd</sup> and 4<sup>th</sup> (Certified)
- Navigator Project Management and Navigator System Series (NSS) Route Maps for systems development
- PRINCE2 2005 (Certified) and MSP 2007 (Certified)
- Portfolio, Programme, Project Management Office (P3O) 2008 (Certified)
- Rational Unified Process (RUP) versions 2003 & 7.x
- The Enhanced Management Framework (EMF) for Information Management and Information Technology
- Unified Modeling Language (UML)
- Use Case Analysis
- YOURDON
- Zachman Framework for Enterprise Architecture

### **IT Service Management**

- Responsible for managing a series of projects / Programmes utilizing ITIL (R2) at PWGSC, one of the largest ITIL deployments in the world
- Responsible for ITSM deliverables in Change Management / Release Management / Incident Management and Service Desk
- Conducted quality assurance audits on deliverables for all of the ITSM service disciplines for PWGSC
- Designing and implementing Service Level Agreements (SLA) and external Service Catalogues

### **Business and Systems Analysis and Design**

- Business Cases
- Cost / Benefit Analysis
- Product Comparison
- Vendor Tool Selection
- Knowledge Management Assessment / Workflow Design
- Requirements Specifications
- Problem Domain Specifications
- Gap Analysis
- Design Specifications
- Business Process Re-engineering

## **Software Product Management**

- Defining new products and gathering product requirements
- Gathering of business and marketing requirements from prospects, customers of earlier versions of the product, domain experts, technology visionaries, market experts, products / solutions from competing vendors, etc.
- Defining product business criteria including managing costs
- Crafting of marketing requirement documents, or MRDs, which synthesize the requirements / needs of various stakeholders as outlined above
- Using the MRD as a basis, develop a product requirements document or PRD, as an input to the engineering team to build out the product. Frequently, a PRD can be a collection of UML Use Cases, UML Activity Diagrams, HTML mockups, etc. It can have other details such as the software development environment, and the software deployment environment
- Delivering the PRD to the software engineering team, and manage conflicts between the business units, the sales teams, and the engineering teams, as it applies to the software products to be built out
- Securing internal resources for product team / working across all functions to bring a product to launch
- Leading teams to ensure execution towards product objectives
- Managing rigorous configuration management for product versioning
- Once the software development gets into build / release cycle, conducting acceptance tests
- Defining supportability and versioning requirements
- Promoting the product externally with press, customers, and partners / bringing new products to market
- Conducting product differentiation reviews
- Conducting product positioning and working with marketing on outbound messaging
- Once the product is deployed at a customer site, soliciting customer feedback, reporting bugs, and passing these on back to engineering for subsequent build / release cycles, as the product stabilizes, and then matures
- Performing competitive analysis as to how the product is behaving in the market, vis-à-vis other products catering to the same / similar customer segments
- Soliciting more features and benefits from the users of the software product, users of competitive products, and from analysts and crafting / synthesizing these requirements for subsequent product build / release cycles, and passing them on to the software engineering team
- Dealing with Product Life Cycle considerations and Product portfolio management

## **Databases - System Software / Languages / Configuration Management / Software Applications**

- Oracle 8i / 9i, DB2, Sybase, MS-SQL Server 6.5 / 7 / 2000, MS-Access
- Websphere, BEA Weblogic, Tomcat, Apache
- dBase, Clipper, Lotus Notes and Lotus Domino, HyperText Markup Language (HTML), Standard Generalized Markup Language (SGML), Extensible Markup Language (XML), Perl, MS Visual Basic, JavaScript, Java Platform Enterprise Edition - Java EE (Java/EJB, Java 2, J2EE), JavaServer Pages (JSP), Java Database Connectivity (JDBC), MS-Active Server Pages (ASP), MS Visual Basic (VB), Power Builder, Adobe Macromedia Flash, Adobe Dreamweaver, Rational Rose
- Visual SourceSafe, Rational ClearCase
- WordPerfect, Corel Office Suite, Microsoft Office Suite, MS Project, MS Visio

## **Training**

- Received formal train the trainer experience from IBM Global Services (Paris)
- Experience designing, writing and presenting training courses in programme / project / technical arenas
- Provided professional training services for the Canadian Department of National Defence (DND), Mitel Corporation, ICC Privy Council Office, DMR, IBM, Lotus Corporation, and the Canadian Department of Foreign Affairs and International Trade (DFAIT)

## CAREER HISTORY

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45	Jul 09 – Current	Environment Canada EC CIOB Continuous Improvement Management Office 9+ months Programme Manager / Project Manager / Risk Manager / Strategic Advisor
44	May 09 – Jun 09	SOMOS Consulting Group Ltd. PRINCE2 Practice Strategy 2 months Executive Management Consultant / PRINCE2 Strategic Advisor
43	Dec 08 – Apr 09	Environment Canada EC CIOB Implementation of PRINCE2 Methodology and PDO 5 months PRINCE2 / PDO Strategic Advisor
42	Aug 08 to Nov 08	Private Consortium (Proprietary) Government of Canada Change Management Maturity Assessment 4 months Executive Management Consultant (Programme / Project / PRINCE2 / Risk Management Advisor)
41	Jan 08 to Jul 08	Public Works and Government Services Canada PWGSC Enterprise Change Management (ECM) Programme 7 months Programme Manager / Senior Project Manager / Risk Manager / Strategic Advisor
40	Jul 07 to Dec 07	Public Works and Government Services Canada ITSM Phase 2 / FA1 & FA2 SWAT Team 6 months PMO Auditor / Senior Project Manager / Strategic Advisor
39	Jan 07 to Jun 07	Public Works and Government Services Canada Asset Management Competency Centre 6 months IT Asset Management Strategic Advisor, Senior Project Manager
38	Jan 05 to Dec 06	Department of Public Safety and Emergency Preparedness Canada 23 months Senior Project Manager / Senior Advisor
37	Feb 04 to Dec 04	Transport Canada 11 months Project Executive / Senior Advisor / Project Auditor
36	Nov 01 to Jan 04	Canada Post Corporation 27 months Programme Executive / PM Auditor / Project Executive / Strategic Advisor
35	Sep 01 to Oct 01	Department of National Defence (DND) 2 months Senior Management Consultant / Senior Project Manager
34	Jul 01 to Aug 01	DCIenable 2 months Project Executive / IT Asset Management Advisor
33	Jun 00 to Jun 01	Manta Corporation Chief Project Officer / Vice President Product Management and Methodology
32	May 01 to Jun 01	Queen's University: School of Business Exec MBA Programme 2 months Project Advisor / Strategic Advisor
31	Jan 01 to Jun 01 (Part-Time 2 months)	Branham Group Inc. Project Executive / Executive Management Consultant
30	Jan 01 to Apr 01	Department of Health Canada 4 months Project Executive / Executive Management Consultant
25-29	Feb 00 to Dec 00	Manta Consulting 11 months Programme Manager / Project Executive / Strategic Advisor / Executive Trainer
29	Jul 00 to Dec 00 (Part-Time 6 months)	Consulting & Audit Canada (CAC) Project Executive / Senior Advisor
28	Jul 00 to Sep 00 (Part-Time 4 months)	Department of Justice (DOJ) Senior Project Manager / Trainer
27	Apr 00 to Nov 00 (Part-Time 8 months)	Air Canada Project Executive / Senior Technical Advisor

26	Sep 97 to Jun 00	Manta Corporation Chief Project Officer / Vice President International Consulting and Methodology
25	Feb 00 to Jun 00 (Part-Time 5 months)	Mystery Shopping Corporation Programme Manager / Senior Technical Advisor
24	Oct 97 to Jan 00 27 months	IBM – Global Services Programme Manager / Strategic Advisor / Senior Project Manager
23	Jan 96 to Sep 97	Manta Corporation Founding & Managing Partner / Chief Technical Architect / Chief Methodologist
21-22	Sep 97 1 month	Newfoundland Power Senior Project Manager / Senior Systems Architect
20	Jul 97 to Aug 97 2 months	Department of Justice (DOJ) Senior Project Manager / Senior Systems Architect
19	Jun 97 1 month	PPI - DFAIT Executive Technology Workshop & Training Management Consultant and Executive Trainer
18	Sep 96 to Jun 97 10 months	Manta Corporation: Products Development Division Vice President Product Development / Programme Manager / Project Executive
17	May 96 to Aug 96 4 months	IBM / Lotus Corporation: Consulting Services PM Advisor / Senior Technical Advisor / Corporate Executive Trainer
16	Mar 96 to Apr 96 2 months	Office of the Commissioner of Official Languages (OCOL) Senior Project Manager / Senior Technical Architect
15	Jan 96 to Feb 96 (Part-Time 2 months)	Canadian International Development Agency (CIDA) Senior Project Manager / Senior Technical Architect
14	Sep 95 to Jan 96 5 months	Strategic Information Systems Corporation (SISC) President, Chief Executive Officer (CEO)
13	Apr 91 to Sep 95	Strategic Information Systems Corporation (SISC) Founding and Managing Partner / Chief Technical Architect
12	Mar 95 to Apr 95 (Part-Time 2 months)	Mitel Corporation Senior Technical Advisor / Facilitator / Executive Trainer
11	May 94 to Sep 94 (Part-Time 5 months)	Communications Security Establishment (CSE) Senior Project Manager / Senior Technical Architect
10	Feb 94 to Feb 96 25 months	Stentor Resource Centre Inc. (SRCI) Programme Manager / Senior Project Manager / Senior Advisor / Senior Technical Architect
09	Jul 92 to Jan 94 19 months	Privy Council Office (PCO) Programme Manager / Senior Project Manager / Senior Technical Architect
07-08	May 92 to Jun 92 2 months	Elections Canada (EC) Management Consultant / Project Lead
06	Feb 92 to Apr 92 3 months	Department of National Defence (DND) Project Manager / Senior Systems Analyst
05	Nov 91 to Jan 92 3 months	Department of National Defence (DND) Project Manager / Technical Architect
04	Mar 91 to Oct 91 8 months	Department of National Defence (DND) Project Manager / Technical Architect
03	Sep 90 to Feb 91 6 months	Department of National Defence (DND) Project Lead / Technical Architect / Senior Systems Analyst / System Administration
02	Jan 88 to Aug 90 32 months	Department of National Defence (DND) LAN Manager / Help Desk Manager / IT Asset Manager / Trainer
01	Mar 87 to Dec 87 10 months	Department of National Defence (DND) IT Asset Management Team Lead / LAN Support / Help Desk Support

## REPRESENTATIVE PROFESSIONAL EXPERIENCE

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### Engagement 45: ENVIRONMENT CANADA (EC)

#### CHIEF INFORMATION OFFICER BRANCH

**Initiative:** Continuous Improvement Management Office

**Timeframe:** Jul 09 to Present

**Methodology:** ITIL, PRINCE2 & MSP (aligned with the GC Enhanced Management Framework), P3O, M\_o\_R

**Risk Assessment:** High Risk

The EC CIOB Continuous Improvement Management Office (CIMO) was initiated in 2009 to provide Business Process Improvement services and to increase the CIOB level of organizational maturity and improve service delivery and client satisfaction. CIMO is intended to take on a horizontal, integrating role as it looks at how IM & IT services are delivered from a people and process perspective. Focusing mostly on "delivery" (customer valued) services, the goal of the CIMO is to continuously evaluate and improve business processes in the light of their efficiency, effectiveness and flexibility. Mr. Milsom was engaged due to his previous experience and reputation at EC CIOB, and as a leading PRINCE2, ITIL, MSP and management consultant within the NCR. Currently Mr. Milsom is responsible for a multi-million dollar programme with eight projects coordinating ten executive consultants. All projects have been managed according to a combination of best practices based on the CIOB PDO framework, MSP, PRINCE2 2005 and PRINCE2 2009.

#### Responsibilities and Accomplishments:

**Position:** Programme Manager / Project Manager / Risk Manager / Strategic Advisor

- Implemented the CIMO support structure and ECollab (SharePoint) ahead of schedule (usual turn around was 6 months, Mr. Milsom negotiated with the CIO management and ECollab team to escalate and implement in 1 month);
- Prepared the preliminary CIMO strategy and project / programme approach;
- Member of the CIOB Procurement SWAT team, and responsible for leading the SSOCIO ECollab Procurement initiative;
- Implemented the CIMO Programme office;
- Provided support to EC organizations on Risk Management strategy and methods;

### Engagement 44: SOMOS Consulting

**Initiative:** PRINCE2 Practice Strategy

**Timeframe:** May 09 to Jun 09

**Methodology:** PRINCE2, MSP, P3O, M\_o\_R

**Risk Assessment:** Low Risk

Mr. Milsom was engaged to provide support and leadership for SOMOS Consulting's APMG PRINCE2 Accredited Consultant Organization (ACO) submission due to Mr. Milsom's extensive expertise and certifications with the PRINCE2 Methodology in the National Capital Region. Mr. Milsom provided strategic guidance, training and support to SOMOS regarding their ACO designation and PRINCE2 consulting training strategy.

#### Responsibilities and Accomplishments:

**Position:** Executive Management Consultant / PRINCE2 Strategic Advisor

Prepared a communications strategy and conducted a number of sessions for consultants to highlight the benefits of PRINCE2 training and certification. Saw a significant rise in consultant training requests over government employees during this period. Also prepared and conducted a series of client PRINCE2 executive overview sessions.

### Engagement 43: ENVIRONMENT CANADA (EC)

#### CHIEF INFORMATION OFFICER BRANCH

**Initiative:** CIOB PRINCE2 PDO

**Timeframe:** Dec 08 to Apr 09

**Methodology:** PRINCE2 & MSP (aligned with the GC Enhanced Management Framework), P3O, M\_o\_R

**Risk Assessment:** High Risk

Due to Mr. Milsom's extensive expertise and certifications with the PRINCE2 Methodology and Project Delivery Offices, as well as establishing PDOs within the Government of Canada, Mr. Milsom was engaged to provide strategic guidance and support for the recently conceived EC CIOB PDO to prepare the underlying support structure.

#### Responsibilities and Accomplishments:

**Position:** PRINCE2 / PDO Strategic Advisor

- Utilized PRINCE2 and customized it to the EC CIOB environment
- Provided a preliminary strategy and vision for the PDO
- Documented a foundational support structure:
  - PM Methodology
  - PM Framework
  - PM Templates
  - EC PRINCE2 Project Management Stakeholder Analysis
  - PM Guidelines
- Provided ongoing guidance and support for the EC CIOB Major Projects on an as required basis
- Provided support for integrating the EC CIOB PDO with other areas of the organization (Portfolio Management, Enterprise Architecture, etc.)
- Provided a high level CIOB Project Management Policy for review

#### **Engagement 42: PRIVATE CONSORTIUM (PROPRIETARY)**

**Initiative:** Government of Canada Change Management Maturity Assessment

**Timeframe:** Aug 08 to Nov 08

**Budget:** Proprietary

**Methodology:** DSDM Atern & PRINCE2 (aligned with the GC Enhanced Management Framework), M\_o\_R, MSP

**Risk Assessment:** Medium Risk

#### **Responsibilities and Accomplishments:**

**Position 42:** Executive Management Consultant (Programme / Project Advisor)

Due to Mr. Milsom's expertise with the Government of Canada, and his extensive executive experience and certifications / qualifications in the PM field, Mr. Milsom was engaged by a Private Consortium to conduct an Executive Assessment on the Government of Canada's Change Management Maturity in the NCR, in relation to a number of leading methodologies / frameworks.

#### **Engagement 41: PUBLIC WORKS AND GOVERNMENT SERVICES CANADA (PWGSC) INFORMATION TECHNOLOGY SERVICES BRANCH (ITSB)**

##### **Service Management and Delivery (SM&D) - IT Service Management (ITSM)**

**Initiative:** PWGSC Enterprise Change Management (ECM) Programme

**Timeframe:** Jan 08 to Jul 08

**Budget:** 9 Resources

1 Programme Manager, 2 Project Managers, 1 Senior Transformation Architect, 1 Change Management Specialist, 1 Senior Process Modeller, 1 ITSM Specialist, 2 SMEs

**Methodology:** DSDM Atern & PRINCE2 (aligned with the GC Enhanced Management Framework), M\_o\_R, MSP

**Risk Assessment:** Medium to High Risk

#### **Background:**

The PWGSC IT Shared Service (ITSS) ECM Programme was formally initiated by the COO in late 2007. It was implemented to help the ITSS effectively deliver highly valued, cost-efficient services to their clients, by managing all changes (business and technical) implemented across the ITSS in a consistent and integrated way. The intent of the programme was to implement a model to predict and manage those changes in a comprehensive manner. Other non-infrastructure based elements such as Call-to-Cash and the Costing Framework could now be regimented under an ECM. ECM was a single, integrated change management frame of reference by which all IT and business changes (including infrastructure and applications) are governed, assessed, controlled, approved, communicated and measured. In practice, it was an enterprise-wide standard that employs common processes and procedures from a common tool set. The intent was to move formal Change Management processes and procedures from the departmental operational level, and imbed formal Change Management within the tactical and strategic levels.

#### **Responsibilities and Accomplishments:**

**Position 41a:** Programme Manager for ECM

- Engaged for the Identifying a Programme and Defining a Programme steps
- During the Identifying step was accountable for getting confirmation on the Programme Mandate and Brief, the overall Strategy, the Programme Preparation Plan was approved, the SRO was approved, and we received funding (150K) and approval to start Defining the Programme
- During the Defining a Programme step, was accountable for establishing the team, identifying the stakeholders and conducting a stakeholder analysis, refining the Vision Statement and developing the Blueprint, risk

management framework, developing the benefit profiles, and designing the projects dossier, as well as coordinating the ECM Secretariats successful design and implementation

- Assisted with the communications plan, and costing model
- Upon completion was successfully transferred over to an FTE after knowledge sharing and training

**Position 41b:** CMDB Reviewer

- The ITSM team was asked to conduct an independent review of the CMDB initiative and make go forward recommendations
- Mr. Milsom acted as the IT Asset Management advisor on the engagement

**Position 41c:** Strategic Advisor (Senior Management Consultant)

- Responsible for submitting a Project Dossier for an online ECM Website and RFC monitoring system
- During this period also had responsibility for the SM&D Service Discipline KPI recommendations analysis, that would become a key measure of the Service Disciplines during the Service Management OLA Monitoring Committee (SOMC) reviews
- Supported the analysis and planned implementation of the associated Executive Change Advisory Board as part of the approved ITSB Governance Committee Structure.

**Position 41d:** Senior Project Manager / Risk Manager

- Assigned responsibility for the SM&D Service Discipline KPI recommendations analysis, with a team of three senior resources
- Accountable for the development and maintenance of the quick win profile (PID), Prioritized Requirements List / product descriptions, project team / roles and responsibilities / governance, stakeholder analysis, risk management framework / analysis / plan / log, issue log, project / stage plans and schedules, change management plan / RFC log, deliverable configuration management, project quality assurance / log, checkpoint / end of stage reviews, status / highlight reporting, project communications, and the successful development and acceptance of the approved project deliverables on schedule
- As the lead ITSM resource trained and knowledgeable in risk management, coordinated risk management for the projects.

**Technical Environment(s):**

All PWGSC IT

**Engagement 40: PUBLIC WORKS AND GOVERNMENT SERVICES CANADA (PWGSC)  
INFORMATION TECHNOLOGY SERVICES BRANCH (ITSB)**

**Service Management and Delivery (SM&D) - IT Service Management (ITSM)**

**Initiative:** ITSM Phase 2 / Focus Areas One & Two SWAT Teams

**Timeframe:** Jul 07 to Dec 07 (6 months)

**Budget:** 16 Resources

1 PM, 1 Senior Transformation Architect, 2 Executive Consultants, 2 Change Mgmt Specialists, 1 Senior Analyst / Technical Writer, 2 Senior Process Modellers, 2 ITSM Specialists, 5 Service Discipline Owners

**Methodology:** DSDM Atern & PRINCE2 (aligned with the GC Enhanced Management Framework), M\_o\_R

**Risk Assessment:** High Risk

**Background:**

As the Treasury Board of Canada "Business Transformation Enablement Program" (BTEP) document states: "A government that can lead change to reach its goals must be able to align and analyze its business using a common language around common functions, and types of Programmes and services and their client groups, across the entire enterprise." The ITSM Project was designed to improve the ITSM processes in support of the vision for a Government of Canada (GC) Information Technology Shared Services (GC ITSS) by designing and implementing industrial strength, repeatable, and scalable processes. The ITSM Project focuses on ITSB (PWGSC) but must also emphasize the link with Other Government Departments (OGD's) and position the organization for use by the GC enterprise ITSS.

The approach taken to implement ITSM within ITSB was based on the ITIL framework and best practices from the UK Office of Government Commerce (OGC). This along with the current business drivers for ITSB formed the guidelines for the overall approach taken by the ITSM Core Team. Special consideration was also given to current industry initiatives such as COBIT, Sarbanes-Oxley, ISO/IEC 20000, and Six Sigma disciplines which has always been planned and ITSM is continuously working towards.

**Responsibilities and Accomplishments:**

**Position 40a:** Programme / Project Management Office Auditor

- Mr. Milsom was assigned responsibility for ITSM Strategic & Tactical Controller for Deliverables & Planning Coordination
- Based on Mr. Milsom's successes and reputation from his previous PWGSC project, he was engaged to evaluate and establish firm Programme / project management control of the SMIP ITSM Programme, involving some 20 projects and related senior resources and activities
- Utilizing the PMI OPM3 and OGC P2MM conducted an assessment of the Project Management practices and re-engineered the ITSM PMO
- Cleaned up the ITSM TB Submission processes to include QA / QC processes to prevent incomplete submissions
- Through executive stakeholder interviews obtained written consensus and common understanding on the required TB deliverables, objectives and prioritization of activities
- Interviewed all of the Service Discipline (SD) Owners and SD Coordinators and reviewed deliverables ensuring they were in alignment with the TB deliverables
- Overhauled the ITSM project schedules to ensure that proper project reporting and management was possible
- Assigned responsibility for reviewing and submitting the ITSM TB Submission for 2007 / 2008 Q3 & Q4

**Position 40b:** Senior Project Manager / Strategic Advisor (IT Asset Management Advisor)

- Due to the previous successes and expertise in IT Asset Management, was assigned the position of Senior Project Manager for Focus Areas One and Two SWAT Teams, managing 10+ senior ITSM resources to provide mission critical executive approved deliverables for the following disciplines Incident Management, Problem Management, Change Management, Configuration Management and Release Management, and given responsibility for the ITSM Managed Service project
- Managed the FA1 Incident Management / Service Desk SWAT teams. Responsible for the Nationalization of the Priority Matrix, DSQ, renewed IMAC Process, IM & SD Process Modeling, SD Coordinator Training, WHY Meeting nationalization, and managing the IM / SD ITSM scheduling. Personally responsible for the KPI Metric analysis and reporting deliverables. During this period IM / SD progressed from one of the most immature Service Disciplines / Functions in SM&D to the leading
- Assigned responsibility for the SM&D Service Discipline KPI recommendations analysis, with a team of three senior resources
- For the projects that were specifically assigned to Mr. Milsom, he was accountable for the development and maintenance of the project business case / brief, project charter / PID, Prioritized Requirements List / product descriptions / product checklist, project team / roles and responsibilities / governance, stakeholder analysis, risk management framework / analysis / plan / log, issue log, project / stage plans and schedules, change management plan / RFC log, deliverable configuration management, project quality assurance / log, checkpoint / end of stage reviews, status / highlight reporting, communications plan and project communications, lessons learned log / report, and the successful development and acceptance of the approved project deliverables on schedule

**Technical Environment(s):**

All PWGSC IT

**Engagement 39: PUBLIC WORKS AND GOVERNMENT SERVICES CANADA (PWGSC)  
INFORMATION TECHNOLOGY SERVICES BRANCH (ITSB)**

**Asset Management Competency Centre (AMCC)**

**Initiative:** ITSS Partner Organization (PO) IT Asset Inventory Transition Project

**Timeframe:** Jan 07 to Jun 07

**Budget:** 4 Resources: 1 PM, 1 Senior Systems Analyst, 2 SMEs

**Methodology:** PRINCE2 (aligned with the GC Enhanced Management Framework), M\_o\_R

**Risk Assessment:** High Risk

**Background:**

The AMCC was responsible for tracking all IT hardware and software (including contracts, warranty) within the department. As the PWGSC ITSS started partnering with other government organizations, there was a requirement for the PWGSC AMCC to take over ownership of the Partner Organization (PO) IT assets.

**Responsibilities and Accomplishments:**

**Position 39a:** IT Asset Management Strategic Advisor / Executive Management Consultant

- Provided Strategic guidance and recommendations for the AMCC regarding ITAM best practices
- Responsible for the development and implementation of the AMCC PO ITAM Transition Methodology
- Mr. Milsom was responsible for preparing the only methodology to date for a Competency Center / Service Discipline for dealing with partner organizations as part of the IT Shared Service initiative

- Though the original plan had allocated 11 months for this initiative, Mr. Milsom was able to complete the methodology in only 5 months
- Negotiated the implementation of an ITAM solution for the Partner Organizations including End User Services
- Documented the IMAC (Install / Move / Add / Change) process for Partner Organizations
- Managed the Partner Organizations and implemented a variety of ITAM processes for the Partner Organizations
- Ensured the PO ITAM Solutions conformed to Industry Best Practices
- Negotiated with ITAM the plan to migrate CSPS IT Asset and Contract Data from Excel to Peregrine AC 4.4
- Provided plans for accelerating the ITAM implementation from two years to six months
- Member of the Order in Council Readiness Working Group representing the AMCC and SM&D

**Position 39b:** Senior Project Manager

- Mr. Milsom was responsible for managing the Partner Organizations (PO) IT Asset Management (ITAM) transition projects and activities for the Canada School of Public Service (CSPS), Department of Veteran Affairs Canada (VAC), Department of Health Canada (HC), Consulting and Audit Canada (CAC), Public Works and Government Services Canada (PWGSC) and the Department of National Defence (DND)
- For the projects that were specifically assigned to Mr. Milsom, he was accountable for the development and maintenance of the project business case / brief, project charter / PID, Prioritized Requirements List / product descriptions / product checklist, project team / roles and responsibilities / governance, stakeholder analysis, risk management framework / analysis / plan / log, issue log, project / stage plans and schedules, change management plan / RFC log, deliverable configuration management, project quality assurance / log, checkpoint / end of stage reviews, status / highlight reporting, communications plan and project communications, lessons learned log / report, and the successful development and acceptance of the approved project deliverables on schedule

**Technical Environment(s):**

- ITIL ITSM, RUP, Windows XP Professional, MS Office Professional, MS Project Professional, MS Visio Professional, Peregrine Asset Center 3.6 & 4.4, Peregrine Service Center

**Engagement 38: DEPARTMENT OF PUBLIC SAFETY AND EMERGENCY PREPAREDNESS CANADA  
CORRECTIONAL SERVICE CANADA (CSC)  
INFORMATION MANAGEMENT SERVICES AND OFFENDER MANAGEMENT SYSTEM (OMS)**

**Initiative:** RUP Domain Model for OMSL & OMSR Architecture / Planning Projects

**Timeframe:** Jan 05 to Dec 06

**Budget:** 5 Resources  
1 PM, 1 Senior Technical Architect, 1 Senior Systems Analyst / Architect, 2 SMEs

**Methodology:** PRINCE2 & RUP (aligned with the GC Enhanced Management Framework)

**Risk Assessment:** High Risk

**Background:**

The OMS is a mission-critical bilingual enterprise system (637 screens, 58 modules & in excess of 25,000 function points) supporting approximately 12,000+ users in HQ, federal institutions, and parole offices nation-wide. The OMS manages approximately 125,000 offenders, of which 25,000 are active offenders. The OMS Renewal project is scheduled with at least 5 million dollars and over 50+ person-years. Users include Parole officers, sentence managers, clerks, correctional officers, case management officers, National Parole Board (NPB) members, wardens, and CSC staff. OMS has interfaces to the Canadian Police Information Centre (CPIC), the RCMP's mission-critical real-time system used by police officers to track offenders who have been released or have escaped into communities across Canada. As well, OMS interfaces with InfoPol, National Parole Board, Citizenship and Immigration Canada, Ontario Sex Offender Registry, Canada Border Services Agency, and Passport Canada. For fifteen years the organization had not documented the system's vision, use cases or business logic, and for five years the OMS Renewal team had been attempting to put together an overall plan for the system without an understanding of what the OMS managed. What documentation that existed was unorganized and scattered throughout network drives (90 GB, 60,000 sub-directories, 700,000 files to search through) that required extensive research to pull the relevant information together in a useable and up to date structure. This engagement was unusually complex and challenging due to conflicting organizational priorities, lack of available and knowledgeable resources, and a highly complicated and dated technical environment.

**Responsibilities and Accomplishments:**

**Position 38a:** Senior Project Manager

- The engagement was to manage and lead a team of senior resources to document the OMS Legacy Rational Unified Process (RUP) Domain Model to provide management with an overview of the OMS architecture, components and interconnectivity for planning / architecture
- Utilizing the PMI OPM3 (and later in 2006 the OGC P2MM) conducted an assessment of the project management practices and conducted an organizational assessment to identify the level of maturity of the organization in project management to justify project management changes to the organization

- Implemented a PMO for the OMS Legacy and Renewal projects
- Accountable for the development and maintenance of the initial business case / brief to justify the project, project charter / PID, Prioritized Requirements List / product descriptions / product checklist, project team / roles and responsibilities / governance, stakeholder analysis, risk management framework / analysis / plan / log, issue log, project / stage plans and schedules (which frequently changed due to priority changes), scheduling of activities and management of team members (due to conflicting priorities needed to continuously negotiate for the resources time and deliverables), change management plan / RFC log, deliverable configuration management, project quality assurance / log, checkpoint / end of stage reviews, status / highlight reporting, communications plan and project communications, lessons learned log / report, and the successful development and acceptance of the approved project deliverables on schedule
- Interfaced with client management to oversee the project's progress, and negotiated additional access to resources that were in demand for competing organizational priorities

**Position 38b: Senior Advisor (Senior Management Consultant)**

- Interfaced with the Business Team to manage the client's expectation and conduct the requirements gathering and research which was a challenge as the Business Team had other priorities
- Mr. Milsom successfully managed the research and documenting of the disparate systems and provide an overall system mapping of its modules and interconnectivity
- Successfully made recommendations for the overall OMS Renewal system architecture based on findings
- Successfully submitted a plan and made recommendations for a go forward phased module development plan for OMS Renewal which was accepted by senior management
- Successfully made recommendations for the OMS Renewal integration with OMSM and other systems

**Technical Environment(s):**

- OMS Legacy: Developed first in 1991, OMS Legacy was a dated Cognos Powerhouse 710G2 (unsupported) character-based system accessed through KEA! 420 Version 5.10n terminal emulation, running on a Borland Interbase V33L3 (unsupported) database running on VMS 7.2-1 operating system.
- OMS Migration: Three tier web-based architecture - client tier is a web browser on the client's desktop, the application server tier (36 servers per region) is composed of active server pages (ASP) and COM+ objects, the data storage tier is the Oracle 9iAS database on the VMS 7.2-1 OS which was a re-platformed OMSL application with the same db structure and features. WebSphere MQ is used for message queuing.
- OMS Renewal: Based on a service component model where heterogeneous clients consume OMS business services via "pluggable" web service protocols (e.g. JAX-RPC, Hessian). The application is developed using Java 2 Enterprise Edition (Java2, Servlet, JSP and EJB), Hibernate, Tapestry, AspectJ and OC4J Oracle Web Application Server / Apache web server with Oracle 9I Database deployed on multi-tier platform. As well a rich client Java application developed using Swing and WebServices was used. User authentication is based on LDAP. OMSR services rely on a central repository of Offender Information called the OMS Data Hub that consolidates OMSM and OMSR offender data into a single data store. The ETL processes required to maintain the Data Hub are being migrated to Oracle Streams. As opposed to OMSM, OMSR is a completely re-engineered OMS with sophisticated data modeling and technology.
- RUP: Utilized the Rational Analyst Suite Studio including Requisite Pro (a management tool), ClearQuest (a change management tool), ClearCase (a configuration management/versioning tool) Rose Modeler Edition (a modeling tool) and the Rational Unified Process (RUP) web site detailing the RUP methodology for iterative development.
- General: Windows XP Professional, MS Office Professional, MS Project Professional, MS Visio Professional, Lotus Notes 6.5.3, UML

**Engagement 37: TRANSPORT CANADA**

- Initiative:** Project Management Review for Application Management Services
- Timeframe:** Feb 04 to Dec 04
- Methodology:** RUP, GC Enhanced Management Framework
- Risk Assessment:** Low Risk

**Responsibilities and Accomplishments:**

**Position:** Project Executive / Senior Advisor / Project Auditor

Mr. Milsom was engaged to provide an internal health check / audit on the IM / IT intranet / extranet projects run within this organization to ensure they were following the new Treasury Board guidelines and reasonable project management / development management practices. The systems were n-tier based with Oracle 9i as the backend with

J2EE applications. The organization used the Rational Unified Process as its software development process to manage its System Development Life Cycle (SDLC).

Utilizing the PMI OPM3 conducted an assessment of the Project Management practices and reviewed the systems and projects to ensure they:

- followed the organization's required information technology security standards;
- conformed to the organizations technology architecture, applications architecture, and architecture principles;
- conformed to the Rational Unified Process (RUP) SDLC;
- followed industry testing / validation best practices;
- had documented and utilized appropriate IM / IT Support Processes (Service / Help Desk, Documentation, etc.);
- followed industry standard project management practices; and,
- properly documented the systems stakeholder business case, needs, features, use cases, requirements, and design specifications for an n-tier system.

**Technical Environment:**

- RUP, ITIL ITSM, J2EE, UML, Oracle 9i, Windows XP Professional, MS Office Professional, MS Project Professional, MS Visio Professional, WebSphere, HTML, JavaScript, Java, GOL

**Engagement 36: CANADA POST CORPORATION**

**Initiative:** Implementation and Management of a Series of Mission Critical Executive Information Systems

**Timeframe:** Nov 01 to Jan 04

**Budget:** \$3,000,000 + (Pitagora's Resource Budget) / \$15,500,000 + (Total IM / IT Budget Managed)  
13 Resources: 1 Programme Executive, 2 Project Managers, 1 Architect, 1 Data Modeller, 2 Testers, 1 Support, 1 DBA, 4 Developers

**Methodology:** RUP, PRINCE2 & SCRUM

**Risk Assessment:** High Risk

**Background:**

Mr. Milsom was recruited to resolve a series of problems affecting Senior Management corporate objectives at Canada Post, caused by previous project management, architectural, and development management issues. Mr. Milsom was engaged to assess and improve the project management, systems analysis and technical architecture of a series of nine mission-critical bilingual Executive Information Systems dealing with corporate legal and security issues. The projects, which included two mission-critical systems rolled out across Canada and the territories, included:

- Matter Management Application Design Audit and Re-engineering, Billing Re-engineering and SAP Integration, and Data Migration;
- Security Management System Audit and Re-engineering and Executive Reporting Module;
- Customer Shipping Theft Reporting System Audit and Re-engineering; and,
- Credit Card Theft Information System Audit and Re-engineering.

The legal system managed over 55,000 cases, 2,500 open at any time, and had an Internet component to allow collaboration with outside legal counsel, and tie-ins to the corporate SAP system for billing. The security system was originally based on a mainframe application, which was retired in Q4 2001. The security system allowed for the organization / classification and tracking of all Canada Post security incidents (theft, fraud, and breakage) logged by Canada Post employees across Canada, as well as the time reporting of security officers, and advanced searching and reporting for senior executives. The systems were n-tier based with Oracle 9i as the backend with a J2EE environment, and a tie in to SAP. The organization used the Rational Unified Process as its software development process in System Development Life Cycle (SDLC).

**Responsibilities and Accomplishments:**

**Position 36a:** Programme Executive / PM Auditor

- Interfaced with the Executive and Senior Management to review requirements and clean up and re-engineer the systems / processes
- Conducted a programme and project management maturity audit and introduced formal project and development management practices
- Divided the systems development into individual projects, reorganized the teams and governance, validated the relationships and dependences, and established a programme strategy for efficiently implementing the corporate objectives
- Despite extensive risk from previous decisions, implemented a risk management framework / analysis / plan / log and was able to proactively manage the programme / project risks
- Provided guidance and mentoring to two other senior project managers

**Position 36b:** Project Executive

- Established the Project Management Office (PMO), the help desk, and managed all of the system testing
- Accountable for the development and maintenance of the initial business cases / brief to justify the project, project charter (PID), Benefit / Cost Analysis, Prioritized Requirements List (product descriptions / product checklist), project team / roles and responsibilities / governance, stakeholder analysis, issue log, project budget, project / stage plans and schedules, change management plan / RFC log, deliverable configuration management, project quality assurance / log, checkpoint / end of stage reviews, exception reports and status / highlight reporting, communications plan and project communications, lessons learned log / report, and the successful development and acceptance of the approved project deliverables on schedule
- Managed the testing team and testing process

**Position 36c:** Strategic Advisor / Executive Management Consultant / IT Asset Management Advisor

- Managed JAD sessions and the systems analysis, and was responsible for the systems architecture
- Personally responsible for developing and maintaining the IM / IT Architecture Plans
- Personally responsible for developing and maintaining the Stakeholder Needs, Features, Use Cases (UML based), Requirements, and Design Specifications
- Ensured systems followed the organization's required information technology security standards and conducted a security and systems audit
- Ensured the systems conformed to the organizations technology architecture, applications architecture, and architecture principles

**Technical Environment:**

- PRINCE2, SCRUM, J2EE, UML, Oracle 9i, SAP R3, Domino, Lotus Notes, Windows NT, Windows XP Professional, MS Office Professional, MS Project Professional, MS Visio Professional, WebSphere, HTML, JavaScript, Java, GOL, C++ / Active Server Pages (ASP) / COM+ objects

**Engagement 35: DEPARTMENT OF NATIONAL DEFENCE (DND)****DIRECTOR GENERAL PUBLIC AFFAIRS (DGPA)**

**Initiative:** National Defence On-Line (NDOL) / Treasury Board (TB) Common Look and Feel (CL&F) Standards Conformance Assessment and Recommendations Report for DGPA Intranet

**Timeframe:** Sep 01 to Oct 01

**Methodology:** DMR Productivity Plus

**Risk Assessment:** Low Risk

**Background:**

The Director General Public Affairs within the Department of National Defence required a review of their Public Affairs Intranet Service that they were responsible to provide to the department to ensure that it conformed to Treasury Board and DND standards. Based on the initial analysis, a detailed conversion plan was prepared to migrate the existing technology to the departmental standard.

**Responsibilities and Accomplishments:**

**Position:** Senior Management Consultant / Senior Project Manager

- Interfaced with Senior Management to review requirements and clean up and re-engineer the systems
- Managed JAD sessions and the systems / technical analysis, responsible for the systems / technical architecture
- Responsible for establishing the Requirements Analysis and Project Implementation Plan for full conversion of the DGPA online INTRANet site
- Documented the current analysis of situation, Treasury Board Common Look and Feel conformance standards report, stakeholders needs, features, requirements analysis, project organization, quality control procedures, informatics project management and administration report, information architecture and database design report, architecture analysis and development methodology report, network and server analysis, workflow process models, business process models, detailed business decision models, management reporting work breakdown schedule identifying phases and activities, resource management and project management plan
- Documented and maintained the Project Charters, Stakeholder Analysis, Project Plans, Budgets, IM / IT Architecture Plans, Exception Reports and Issues Summaries, Project Management Reports, and Resource Requirements
- Ensured systems followed the organization's required information technology security standards
- Ensured the systems conformed to the organizations technology architecture, applications architecture, and architecture principles

**Technical Environment:**

- EMF, J2EE, UML, Oracle 9i, Windows NT, MS Office Professional, MS Project Professional, MS Visio Professional, WebSphere, HTML, JavaScript, Java, GOL

### **Engagement 34: DCIENABLE - CONSULTING SERVICES**

**Initiative:** IT Asset Management Strategy and Solution for DCIENABLE

**Timeframe:** Jul 01 to Aug 01

**Budget:** 7 Resources: Architect, Administrator, DBA / Data Modeller, Senior Developer

**Methodology:** SCRUM

**Risk Assessment:** Medium Risk

#### **Background:**

After spending several years acquiring various corporations to support DCIENABLE's strategic vision, the cost of maintaining and supporting all of the different IT environments was spiralling out of control. In order to optimize support and reduce hardware / software costs for the corporation it was decided by the board to implement a full IT Asset Management strategy and solution.

#### **Responsibilities and Accomplishments:**

**Position:** Project Executive / IT Asset Management Advisor

- Over the engagement conducted a baseline assessment of the infrastructure and ITAM support processes, and made recommendations for rationalizing to seven DCE platforms (5 + 2 engineering platforms) from 45. Reduced COTS software platforms and versions as well to a corporate standard, and implemented a formal Software Asset Management process for tracking licences.
- All purchases were centralized and had to conform to predefined standards.
- All users were assigned an IT platform and any IMAC changes required updating of the ITAM profile.

### **Engagement 33: MANTA CORPORATION**

**Timeframe:** Jun 00 to Jun 01

**Position:** Chief Project Officer / Vice President: Product Management & Methodology

#### **Responsibilities and Accomplishments:**

- Manta Corporation had grown to over 150 resources during this time, and was a multi-million dollar a year Consulting Services Corporation;
- Based on Mr. Milsom's extensive experience with product development both within Manta and at IBM Global Services, Mr. Milsom took over leadership of implementing the proper corporate disciplines for product management, architecture, design, testing, configuration management, and versioning for Manta Corporation's evolving product practice. Mr. Milsom wrote the business case to justify this position, which was accepted by the board of directors
- Mr. Milsom also continued advising consulting projects on best practices for programme / project management and IM / IT consulting, and implemented and advised the Manta Programme / Project Management Office, and reviewing deliverables as required
- Due to the success of these initiatives, Manta Corporation's product practice became so successful it branched off and created its own corporation, Halogen Software Corporation, which provided web-based fully customizable survey and questionnaire software for employee appraisals and other services

### **Engagement 32: QUEEN'S UNIVERSITY: SCHOOL OF BUSINESS EXECUTIVE MBA PROGRAM**

**Initiative:** Executive MBA System's Online Web Environment Evaluation Phase 1

**Timeframe:** May 01 to Jun 01

**Budget:** 4 Resources: Project Manager, Technical Architect, Network Administrator, Senior Developer

**Methodology:** IBM / Lotus Accelerated Value Method (AVM)

**Risk Assessment:** Low Risk

#### **Background:**

The Queen's School of Business, Executive MBA Program, wanted to evaluate the replacement of their existing system with an IBM / Lotus solution utilizing the iNotes, Notes / Domino (Team Room), SameTime, and QuickPlace technologies integrated with WebSphere and Oracle. This phase of the project was to provide a testing environment to evaluate the technologies, and to provide the business and technical documentation to decide on the next steps.

#### **Responsibilities and Accomplishments:**

**Position:** Project Advisor / Strategic Advisor

- Prepared, delivered, and negotiated the proposal, project plan, and architectural approach for the engagement
- Interfaced with Senior Management to review requirements and clean up and re-engineer the systems

- Managed JAD sessions and the systems / technical analysis
- Acted as the technical and architectural advisor for the project, responsible for the systems / technical architecture
- Documented and maintained the Project Charters, Benefit / Cost Analysis, Stakeholder Analysis, Project Plans;
- Provided the specification templates and acted as a key reviewer for the documentation, which included the Stakeholder Analysis, Stakeholder Needs, Use Cases, Requirements, Problem Domain, Architectural Design, Infrastructure, and External Design Specifications
- Ensured systems followed the organization's required information technology security standards
- Ensured the systems conformed to the organizations technology architecture, applications architecture, and architecture principles and managed the testing team and testing process

**Technical Environment:**

- J2EE, UML, Oracle 8i, WebSphere, SameTime, iNotes, TeamRoom, Lotus Notes, Lotus Domino, Windows NT, MS Office Professional, MS Project Professional, MS Visio Professional, HTML, JavaScript, Java

**Engagement 31: BRANHAM GROUP INC.**

**Initiative:** Evaluation of Competitors to IBM / Lotus Knowledge Management and Document / Content Management Systems

**Timeframe:** Jan 01 to Jun 01

**Budget:** 4 Resources

**Methodology:** IBM / Lotus Accelerated Value Method (AVM)

**Risk Assessment:** Low Risk

**Background:**

The Branham Group required a team of Knowledge Management and Document / Workflow Management professionals to perform the product and marketing evaluation of various products that competed with a leading Fortune 100 IM / IT Professional Corporation's Knowledge Management and Document / Content Management Products. The reports dealt with the following areas: marketing strategy, pricing, competitors / partnerships, features / functions, & future directions.

**Responsibilities and Accomplishments:**

**Position 31a:** Project Executive

- Interfaced with Senior Management to review requirements and negotiate contract
- Responsible for the project planning and costing, designing the approach and research support systems

**Position 31b:** Executive Management Consultant

- Responsible for the analysis of the IM / IT Professional Corporation's Knowledge Management (KM) competitor Autonomy Corporation, which included four product reviews

**Technical Environment:**

- MS Office Professional, MS Project Professional, MS Visio Professional, Autonomy KM product suite

**Engagement 30: DEPARTMENT OF HEALTH CANADA (HC)  
POPULATION AND PUBLIC HEALTH BRANCH (PPHB)**

**Initiative:** Recommendations for the Adoption of Web-Based Development Standards

**Timeframe:** Jan 01 to Apr 01

**Budget:** 3 Resources

**Methodology:** IBM / Lotus Accelerated Value Method (AVM)

**Risk Assessment:** Medium Risk

**Background:**

Prior to this engagement, the PPHB had identified a significant backlog of mission critical applications that had to be developed for the web (either Internet or intranet) within a one-year timeframe. This engagement involved preparing a plan for evaluating and customizing the Government Online (GOL) standards for HC's PPHB against which all subsequent PPHB Lotus Notes and Oracle Web-Based development would be managed, involving three senior consultants.

**Responsibilities and Accomplishments:**

**Position 30a:** Project Executive

- Prepared, delivered, and negotiated the proposal, project plan, and architectural approach for the engagement
- Documented and maintained the Project Charters, Benefit / Cost Analysis, Stakeholder Analysis, Project Plans
- Ensured that the organizations followed industry testing / validation best practices

- Based on the acceptance of these standards, PPHB was able to significantly decrease its backlog in record time

**Position 30b:** Executive Management Consultant

- Interfaced with Senior Management to review requirements and clean up and re-engineer the systems
- Managed JAD sessions and the systems / technical analysis, responsible for the systems / technical architecture
- Acted as the technical and architectural advisor for the project
- Documented and maintained the Design Specifications, workflow process models, business process models, detailed business decision models, and data models
- Ensured systems followed the organization's required information technology security standards
- Ensured the systems conformed to the organizations technology architecture, applications architecture, and architecture principles

**Technical Environment:**

- RUP, J2EE, UML, Oracle 8i, Lotus Notes, Lotus Domino, Windows NT, MS Office Professional, MS Project Professional, MS Visio Professional, HTML, JavaScript, Java, GOL

**Engagement 29: CONSULTING & AUDIT CANADA (CAC)**

**Initiative:** Extranet Web Site Development

**Timeframe:** Jul 00 to Dec 00 (Part Time)

**Budget:** 4 Resources

**Methodology:** IBM / Lotus Accelerated Value Method (AVM)

**Risk Assessment:** Medium Risk

**Background:**

Consulting and Audit Canada was required to develop a multi-tier web-based architecture Extranet site that allowed their clients to access it's various services and make online requests and check the status of their projects. Mr. Milsom managed a team of four senior resources during this process.

**Responsibilities and Accomplishments:**

**Position 29a:** Project Executive

- Interfaced with Senior Management to review requirements and clean up and re-engineer the systems
- Prepared, delivered, and negotiated the proposal, project plan, and architectural approach for the engagement
- Acted as the technical and architectural advisor for the solution to ensure GOL standards were followed
- Documented and maintained the Project Charters, Benefit / Cost Analysis, Stakeholder Analysis, Project Plans, Budgets, IM / IT Architecture Plans, Exception Reports and Issues Summaries, Project Management Reports, and Resource Requirements
- Managed the testing team and testing process

**Position 29b:** Senior Advisor (Senior Systems / Technical Architect)

- Managed JAD sessions and the systems / technical analysis, responsible for the systems / technical architecture
- Reviewed and approved for the design documentation, which included the Stakeholder Needs, Features, Use Cases (UML based), Requirements, and Design Specifications, workflow process models, business process models, detailed business decision models, and data models
- Ensured systems followed the organization's required information technology security standards
- Ensured the systems conformed to the organizations technology architecture, applications architecture, and architecture principles

**Technical Environment:**

- J2EE, UML, Oracle 8i, Lotus Notes, Lotus Domino, Windows NT, MS Office Professional, MS Project Professional, MS Visio Professional, HTML, JavaScript, Java, GOL

**Engagement 28: DEPARTMENT OF JUSTICE (DOJ)  
CANADIAN FIREARMS COMMISSION (CFC)**

**Initiative:** Electronic Firearms Application for Licensing (EFAL) Help Desk System: Development

**Timeframe:** Jul 00 to Sep 00 (Part Time)

**Budget:** 6 Resources: 2 Developers, 1 Tester, 1 Technical Writer, 1 Trainer, and 1 UI Specialist

**Methodology:** IBM / Lotus Accelerated Value Method (AVM)

**Risk Assessment:** Medium Risk

**Background:**

The CFC identified a mission critical requirement to implement a Help Desk System for CFC's EFAL application, which included an Asset Management Component (Firearms Registry). EFAL was designed to aid the Canadian Public in registering their firearms, and the Help Desk was implemented to provide support to the Canadian Public for any problems or questions regarding the EFAL System. This engagement was for the review and selection of a Help Desk Product, that could tie into the registry and deal with IMACs, from the leading third-party Help Desk products, and if necessary the customization of the accepted third-party system.

**Responsibilities and Accomplishments:**

**Position:** Senior Project Manager / Trainer

- Prepared, delivered, and negotiated the proposal and project approach with the client
- Developed the preliminary Business Plan, and then upon plan acceptance to provide the detailed Project Plan and costing, Requirements Specification, Architectural Analysis, External Design Specifications, and the Project Management for the EFAL Help Desk System
- Though there were several plan and contract change orders due to client organizational and requirements changes, the system was delivered on time and under budget based on the approved plan of record

**Technical Environment:**

- UML, Oracle 8i, Lotus Notes, Lotus Domino, Windows NT, MS Office Professional, MS Project Professional, MS Visio Professional, HTML, JavaScript, Java, GOL

**Engagement 27: AIR CANADA**

**Initiative:** Canadian Air “On- Board Reporting” Web-Based Software Integration Program

**Timeframe:** Apr 00 to Nov 00 (Part Time)

**Budget:** 8 Resources: 1 Database Administrator, 1 Data Modeler, 1 Architect, 3 Developers, 2 Testers

**Methodology:** IBM / Lotus Accelerated Value Method (AVM)

**Risk Assessment:** High Risk

**Background:**

The customized program contained several software development projects. Included in the projects was the development of the Web Based “On- Board Reporting” software database product used to track customer complaints on aircraft. The Air Canada on-board support staff would fill out forms regarding customer complaints, recommendations, and food allocations. These reports would be faxed to Headquarters, OCR scanned, data manipulated, and loaded into a database for review by management.

**Responsibilities and Accomplishments:**

**Position:** Project Executive / Senior Technical Advisor

- Responsible for establishing the Project Management Office (PMO) to manage the mission critical project management work products for Air Canada and Manta resources to review and update
- Responsible for advising on connectivity between Domino and Oracle
- Reviewed and advised on all project deliverables

**Technical Environment:**

- UML, Oracle 8i, Lotus Notes, Lotus Domino R5.0, HTML, JavaScript, Java, SQL Windows NT, MS Office Professional, MS Project Professional, MS Visio Professional, Fax gateway, OCR reading and scanning

**Engagement 26: MANTA CORPORATION**

**Timeframe:** Sep 97 to Jun 00

**Position:** Chief Project Officer / Vice President: International Consulting & Methodology

**Responsibilities and Accomplishments:**

- After identifying the requirement and opportunity, Mr. Milsom established and managed a new Consulting Services Division for consulting engagements outside of the national capital region, with an emphasis on the USA
- Mr. Milsom wrote the business case to justify this position, which was accepted by the board of directors
- Worked with the sales team to acquire new accounts, choose team members willing and able to work outside of Ottawa, and manage and develop the accounts personally
- Based specifically on the success of Mr. Milsom’s Programmes, Manta Corporation was able to acquire second round financing in excess of 5 million
- Due to the complexity of managing geographically dispersed teams, Mr. Milsom also took on the responsibility for implementing best practices and a methodology for managing engagements from PMI and Bates, which was phased in corporately during 2000

- The creation of the Manta Project Management Office implemented new project management methods, practices, processes and helped Manta clean up a number of projects, and gave senior management a better understanding of the projects and where to focus resources

### **Engagement 25: MYSTERY SHOPPING CORPORATION**

**Initiative:** Web-Based Mystery Shopping System

**Timeframe:** Feb 00 to Jun 00 (Part Time)

**Budget:** 8 Resources

**Methodology:** Bates

**Risk Assessment:** High Risk

#### **Background:**

This was a large US Mystery Shopping firm that conducted surveys for major department stores. It had purchased the services of an IM / IT consulting firm to design a customized mystery shopping system to allow it to manage its database of several thousand mystery shoppers, to manage the customizable monthly mystery shopping questionnaire requests from its clients, the assignment of questionnaires to mystery shoppers, the online collection of the filled in requests from the mystery shoppers, and the automated data analysis and reports for the clients. The purchased system did not work properly however, and required immediate help in order to fulfill its obligations to its clientele. The principals subsequently sold the business and retired in 2005.

#### **Responsibilities and Accomplishments:**

**Position 25a:** Programme Manager

- Mr. Milsom was called in to get the engagement back on track after some initial setbacks and concerns expressed by the client
- Conducted a project management audit, and immediately implemented formal project management best practices
- Documented and maintained the Project Charters, Benefit / Cost Analysis, Stakeholder Analysis, Project Plans, Budgets, IM / IT Architecture Plans, Exception Reports and Issues Summaries, Project Management Reports, and Resource Requirements
- Managed the testing team and testing process

**Position 25b:** Senior Systems / Technical Architect

- Cleaned up the system so it was functional in less than one month, and then properly re-engineered the system with the appropriate level of modularity, customizability and data integrity for the client to implement required changes and ensure they could make whatever ongoing modifications were required
- Interfaced with Senior Management to review requirements and clean up and re-engineer the systems
- Managed JAD sessions and the systems / technical analysis, and was responsible for the systems / technical architecture
- Documented and maintained the Stakeholder Needs, Features, Use Cases (UML based), Requirements, and Design Specifications, Architectural Specifications, External Design Specifications, workflow process models, business process models, detailed business decision models, and data models
- Conducted the product assessment to identify the report generation tool for the system, which would feed the Web Site, and documented the report generation procedures guide
- Established the remote development infrastructure
- Ensured systems followed the organization's required information technology security standards
- Ensured the systems conformed to the organizations technology architecture, applications architecture, and architecture principles
- Customized and implemented a Help Desk call center to track online and phoned in submissions and track the issue from initial logging to completion. The Help Desk system was also integrated into the change request and bug tracking system
- The infrastructure, analysis, requirements and specifications were done onsite, and the development and testing was conducted in Ottawa

#### **Technical Environment:**

- UML, SQL Server 7, Lotus Notes, Lotus Domino, Windows NT, MS Office Professional, MS Project Professional, MS Visio Professional, HTML, JavaScript, Java

### **Engagement 24: IBM - GLOBAL SERVICES**

**Initiative:** IBM Global Services Programme / Project Management Support Re-Engineering

**Timeframe:** Oct 97 to Jan 00

**Budget:** \$8,400,000 + (Manta's Resource Budget) / \$30,000,000 + (Total IM / IT Budget Managed)

**Methodology:** IBM / Lotus Accelerated Value Method (AVM) / PRINCE2

**Risk Assessment:** High Risk

**Background:**

IBM's Worldwide Solution Design and Delivery Methods (WSDDM) Division designed and implemented IBM's best practices comprehensive approach to projects that is based on the capture, constant refinement and application of IBM's solution-oriented experience to ensure successful client projects. Mr. Milsom was responsible for the successful execution of a series of projects, including the Project and Programme Management Systems (PCB and POST), and Methods Authoring (D7 and ITC). The PCB and POST systems, deployed globally and translatable into 52 languages (including double-byte) using IBM's Notes Global Designer Technology, assisted IBM's Project Managers to consistently monitor and communicate all mission critical project management work products, including milestones, issues, risks, changes, meetings, and decisions. It embedded the corporations' best practices business logic and guided project teams to more successfully and consistently manage their projects. The PCB and POST systems were both developed with IBM's Human Factoring Labs. Due to the successes of the initial project, the engagement started with one project and five consultants, and grew to three engagements with multiple releases and 37 consultants who worked for Mr. Milsom during the duration of this Programme.

**Responsibilities and Accomplishments:**

**Position 24a:** Programme Manager

- After three attempts from other leading Manhattan consulting firms who had failed to provide the services required, Mr. Milsom's team was the first service provider to turn the engagement around and deliver successful results under very aggressive constraints
- Prepared, delivered, and negotiated the proposal and project approach with the client
- Interfaced with Senior Management to review requirements and clean up and re-engineer the systems
- Implemented a PMO and implemented and enforced the IBM project management best practices
- The projects managed and architected by Mr. Milsom during this engagement included the following:
  - PMP Operations Support Tool (POST): POST
  - Project Control Book (PCB): 1.0, 1.0.1, 2.2, 2.2 Maintenance, 2.3 Core, and 2.3 SI
  - ITC Methodology Management Development: 1.0, 1.1, 2.0

**Position 24b:** Senior Project Manager

- Prepared, delivered, and negotiated the proposal and project approach with the client
- Documented and maintained the Project Charters, Benefit / Cost Analysis, Business Cases, Stakeholder Analysis, Project Plans, Budgets, IM / IT Architecture Plans, Exception Reports and Issues Summaries, Project Management Reports, and Resource Requirements
- Managed the testing team and testing process
- Though there were numerous plan and contract change orders due to client organizational / technical requirements changes, the systems were delivered on time and under budget based on the approved plan of record

**Position 24c:** Strategic Advisor

- Managed JAD sessions and the systems / technical analysis, and was responsible for the systems / technical architecture
- Documented and maintained the Stakeholder Needs, Features, Use Cases (UML based), Requirements, and Design Specifications, Architectural Specifications, External Design Specifications, workflow process models, business process models, detailed business decision models, and data models
- Responsible for the development methodologies and standards and interface specifications, implementing configuration management support tools for design element and release versioning and control, and development support tools for managing the work breakdown process, and managing design element quality
- Established the remote development infrastructure
- Ensured systems followed the organization's required information technology security standards
- Ensured the systems conformed to the organizations technology architecture, applications architecture, and architecture principles
- Customized and implemented a Help Desk call center to track online and phoned in submissions and track the issue from initial logging to completion. The Help Desk system was also integrated into the change request and bug tracking system
- Due to the success of this engagement, Mr. Milsom was asked to work with IBM's managed service / IT Outsourcing practice, focusing on best practices

**Position 24d:** IT Asset Management Advisor

- The last phase dealt with customizing the PCB to deal with specific competencies, and ITAM was chosen with several case study accounts
- Mr. Milsom provided subject matter specialist advice on the customizations

**Technical Environment:**

- UML, Oracle 8i, Lotus Notes, Lotus Domino, Rational Rose, Windows NT, MS Office, MS Project, Visio, HTML, JavaScript, Java

**Engagement 23: MANTA CORPORATION**

**Timeframe:** Jan 96 to Sep 97

**Position:** Founding and Managing Partner / Chief Technical Architect / Chief Methodologist

After the creation of Manta Corporation and the corporate re-organization, Mr. Milsom continued to focus on developing business, managing accounts, developing large scale systems, and acting as the Chief Technical Architect to advise other projects in areas relating to Knowledge Management, Executive Information System, Messaging and Document Management projects.

**Engagement 21-22: NEWFOUNDLAND POWER**

**Initiative:** Assessment & Subsequent Development for Converting Client / Server Systems to Web-Based Systems

**Timeframe:** Sep 97

**Budget:** 17 Resources

**Methodology:** IBM / Lotus Accelerated Value Method (AVM)

**Risk Assessment:** Medium Risk

**Background:**

Due to a change in CIO and corporate IM / IT direction, the client decided to migrate a number of its client / server systems to web-based systems. The objective was to identify if the same functionality from the corporate client / server applications could be migrated to a thin web browser client, thus saving the cost of the client / server client desktop licence. After the assessment proved to the executive that the re-engineering was possible, for this engagement, six systems were slated to be modified, including: Requisition for Purchasing System, Employee Payroll Change, Contribution in Aid of Construction (CIAC) Database, Regulatory Compliance, Corporate Manual, and Corporate Secretary.

**Responsibilities and Accomplishments:**

**Position 21-22a:** Senior Project Manager

- Prepared, delivered, and negotiated the proposal and project approach with the client
- Engaged as the Project Manager to re-architect and migrate a number of corporate client / server systems to Web-based systems
- Documented and maintained the Project Charters, Benefit / Cost Analysis, Business Case, Stakeholder Analysis, Project Plans, Budgets, Exception Reports and Issues Summaries, Project Management Reports, and Resource Requirements

**Position 21-22b:** Senior Systems / Technical Architect

- Engaged as the Senior Technical Architect to review six existing client / server applications, review their architectural design, and make recommendations on converting the applications from client / server to web-based with a IE 3 / 4 or Netscape Navigator 3.# (had to be designed to identify what the browser was due to different interpretations of JavaScript) Web browser front end
- Engaged to conduct a Product Assessment of an Application Web Server to confirm that the same functionality in the client / server applications could be converted to the web
- The assessments proved that the previous functionality provided by the client / server client could be provided in the web-based MS Internet Explorer / Netscape Navigator interface
- Responsible for configuring the client's client / server messaging environment
- For the purposes of this engagement, all work was done locally and replicated over to Newfoundland Power
- Preliminary proof of concepts were reviewed on a local test domain Web site, before Newfoundland Power's application web server was configured

**Technical Environment:**

- UML, SQL Server 6.5, Lotus Notes, Lotus Domino, Windows NT, MS Office, MS Project, Visio, HTML, JavaScript

**Engagement 20: DEPARTMENT OF JUSTICE (DOJ)  
CANADIAN FIREARMS COMMISSION (CFC)**

**Initiative:** Automated Mailing List Application (AMLA)  
**Timeframe:** Jul 97 to Aug 97  
**Budget:** 7 Resources  
**Methodology:** IBM / Lotus Accelerated Value Method (AVM)  
**Risk Assessment:** High Risk

**Background:**

This was a mission critical / time sensitive engagement due to the highly charged political nature of the Canadian Firearms project. The engagement was to develop a public bulletin distribution system for the Canadian Firearms Center Communication Group. This group had been mandated to provide certain demographic groups with current and accurate information regarding the Firearms Act in a timely manner. The application was designed to intelligently broadcast bulletins and other public updates to the Canadian Firearms Center's contact listing. The bulletins had to be in the preferred language of the contact, which if it was not known was based on geographic location (i.e. Bilingual with French first in Quebec, Bilingual with English first in other parts of Canada, or the preferred language of choice). The broadcasts could be made either by e-mail, fax, or by land mail, and the distribution method was in that order of sequence (e-mail being the most efficient and inexpensive, land mail being the most expensive and taking the longest time).

**Responsibilities and Accomplishments:**

**Position 20a:** Senior Project Manager

- Mr. Milsom was brought in three-quarters of the way through this engagement to bring the initiative back on track after several key client and consulting resources had left the project, and development was significantly over schedule and not providing the required functionality
- Mr. Milsom was responsible for introducing proper project management principles, re-establishing effective communications with the client and managing expectations

**Position 20b:** Senior Systems / Technical Architect

- Mr. Milsom personally re-architected the design and technical environment of the system, and managed the systems redesign, the Fax Service Implementation, and the SMTP Mail Implementation for the system

**Technical Environment:**

- UML, Lotus Notes, Lotus Domino, Fax Server, SMTP Mail Server, Windows NT, MS Office, MS Project, Visio

**Engagement 19: PRODUCTIVITY POINT INTERNATIONAL (PPI)**

**Initiative:** DFAIT Executive Technology Workshop and Training  
**Timeframe:** Jun 97  
**Budget:** Proprietary  
**Methodology:** n/a  
**Risk Assessment:** Low Risk

**Responsibilities and Accomplishments:**

**Position:** Management Consultant and Executive Trainer

- Mr. Milsom was engaged to manage the development and facilitation of a three-day high-level executive overview of the technologies for DFAIT's senior executives to evaluate the technology
- Topics included Web development, benefits of the development environment, security, communications, integration with RDBMS back ends, and project \ development management issues.

**Engagement 18: MANTA CORPORATION  
PRODUCTS DEVELOPMENT DIVISION**

**Initiative:** MantaSALES Product Development: Core Product Development  
**Timeframe:** Sep 96 to Jun 97  
**Budget:** \$1,500,000 / 9 Resources  
**Methodology:** IBM / Lotus Accelerated Value Method (AVM)  
**Risk Assessment:** Medium Risk

**Background:**

MantaSALES was Manta Corporation's first OpenWrap product. The objective was to set up a division, which could develop, manage, and market client / server related products.

**Responsibilities and Accomplishments:**

**Position:** Vice President Product Development / Programme Manager / Project Executive

- Mr. Milsom was responsible for managing the market research, managing the full software development life cycle, identifying the product features and requirements, managing the documentation, design, development, establishing the test environment and managing the testing, user help, versioning and packaging of the product line and aiding the sales team at conferences
- This division became an internal R&D shop for Manta, as the developers were given the flexibility to test out new ideas and concepts on their own time
- Manta made a number of sales of this product, and its code base library (which from the start was designed following object oriented principles) was used to support numerous other projects
- This division evolved into MantaInsight's product organization, which later became Halogen Systems Corporation

**Technical Environment:**

- SQL Server 6.5, Lotus Notes, Lotus Domino, Windows NT, MS Office, MS Project

**Engagement 17: LOTUS CORPORATION  
CONSULTING SERVICES**

**Initiative:** Accelerated Value Method (AVM) Program Development and Executive Training

**Timeframe:** May 96 to Aug 96

**Budget:** Proprietary

**Methodology:** IBM / Lotus Accelerated Value Method (AVM)

**Risk Assessment:** Low Risk

**Background:**

In the mid 1990's, Lotus Corporation identified that there was a lack of project management discipline in their business partner's engagement community. Lotus identified that often with intranet and internet projects consultants focus on applications and infrastructure was missing the important people and process issues associated with real project success. To help clients and their business partner community effectively redesign business processes, manage cultural change, and control project dynamics, Lotus Consulting with IBM Global Services created the Accelerated Value Method (AVM). This consisted of five modules: Engagement Management, Transformation Management, Process Innovation, Collaborative Development, and Enterprise Deployment.

**Responsibilities and Accomplishments:**

**Position:** Project Management Advisor / Senior Technical Advisor / Corporate Executive Trainer

- After completing the Lotus AVM training program, was recruited by Lotus Consulting as a train the trainer and corporate trainer, and as a senior advisor for project management and technical support
- Mr. Milsom was a senior advisor to provide recommendations on the AVM program and on managing collaborative projects and dealing with advanced Lotus implementations
- Mr. Milsom provided training and technical support in Paris France, Dallas TX, Chicago IL, Boston MA, Cambridge MA, Washington DC, and Ottawa ON on the Lotus AVM Program

**Engagement 16: OFFICE OF THE COMMISSIONER OF OFFICIAL LANGUAGES (OCOL)  
CORPORATE SERVICES**

**Initiative:** Complaints Investigation Management System (CIMS) Redesign and Optimization of the OCOL Client / server Messaging & Application Server Infrastructure

**Timeframe:** Mar 96 to Apr 96

**Project Budget:** 3 Resources

**Methodology:** DMR Productivity Plus

**Risk Assessment:** Medium Risk

**Background:**

OCOL identified a number of serious usability and implementation problems with CIMS, which had been developed by another organization but never fully tested or put into production. A number of concerns over performance, stability, and scalability were identified which required immediate assessment and resolution.

**Responsibilities and Accomplishments:**

**Position 16a:** Senior Project Manager

- Mr. Milsom was responsible for introducing proper project management principles, re-establishing effective communications with the client and managing expectations

**Position 16b:** Senior Technical Architect

- Mr. Milsom was responsible for the review, evaluation, testing, and recommendations for re-engineering the system to resolve the outstanding issues
- Mr. Milsom was also responsible for supporting the Informatics Division review and optimize their infrastructure, which had noticeable response rate problems
- Based on the success of this engagement, Manta Consulting kept a team of consultants working to evolve CIMS for several years

**Technical Environment:**

- Lotus Notes R3 & R4, Windows NT, MS Office, MS Project

**Engagement 15: CANADIAN INTERNATIONAL DEVELOPMENT AGENCY (CIDA)  
CORPORATE MANAGEMENT BRANCH (CMB)  
INFORMATION MANAGEMENT AND TECHNOLOGY SERVICES DIVISION (IMTSD)**

**Initiative:** Client Server Application Development Standards

**Timeframe:** Jan 96 to Feb 96 (Part Time)

**Budget:** 3 Resources

**Methodology:** DMR Productivity Plus

**Risk Assessment:** Low Risk

**Background:**

CIDA identified a requirement to establish and implement formal client server application development standards to guide development teams into consistently developing applications that followed the Agencies standards. This would reduce development time, project risk, testing, and would provide a more unified systems environment for the end-user community.

**Responsibilities and Accomplishments:**

**Position 15a:** Senior Project Manager

- Prepared, delivered, and negotiated the proposal and project approach with the client
- Documented and maintained the Project Charter, Business Case, Stakeholder Analysis, Project Plan, Exception Reports and Issues Summaries, and Project Management Reports

**Position 15b:** Senior Technical Architect (Management Consultant)

- Mr. Milsom's team was engaged to develop CIDA's Client Server Application Development Standards, based on his experience and success developing SRCI's, Mitel's, and the Privy Council Office's Client Server development standards
- The team reviewed the Health Canada Client Server "Cook Books", and compared those with SISC's own standards and methodology (utilized by Stentor / Mitel / PCO) to come up with a best of breed
- The team interviewed a number of key CIDA personnel to get a better understanding of the CIDA environment and requirements to customize the standards
- Upon completion, the standards and a recommendation report to implement the standards were presented to senior management, and formally implemented within CIDA

**Engagement 14: STRATEGIC INFORMATION SYSTEMS CORPORATION (SISC)**

**Timeframe:** Sep 95 to Jan 96

**Position:** President / Chief Executive Officer (CEO)

**Background:**

After a shareholder buyout within SISC during 1995, Mr. Milsom remained as the sole owner and President of SISC during the transition.

**Responsibilities and Accomplishments:**

- As a principle shareholder of the new corporation Manta, Mr. Milsom brought a fully operational business with over 35 senior and intermediate consultants and support staff to Manta Corporation, with annual sales over \$3M(CDN)
- Mr. Milsom was responsible for growing SISC to one of the largest IBM Messaging and Knowledge Management practices in North America and continued within Manta to evolve the practice

**Engagement 13: STRATEGIC INFORMATION SYSTEMS CORPORATION (SISC)  
CONSULTING SERVICES**

**Timeframe:** Apr 91 to Sep 95

**Position:** Founding and Managing Partner / Chief Technical Architect

**Initiative:** Messaging / Knowledge Management Division

Strategic Information Systems Corporation was created with the goal of providing clients with leading corporate Information Technology solutions to resolve major corporate challenges. Mr. Milsom focused on the Messaging and Knowledge Management initiative. Mr. Milsom was responsible for managing a number of major accounts, including the Privy Council Office and Stentor Resource Centre Inc (SRCI), incorporate these technologies into a highly effective organizational information backbone.

#### **Engagement 12: MITEL CORPORATION**

**Initiative:** Development of a Client / Server Architecture, Deployment Strategy and Application Development Guidelines

**Timeframe:** Mar 95 to Apr 95 (Part Time)

**Methodology:** Method / 1

**Risk Assessment:** Medium Risk

#### **Background:**

Mitel's Network Services Support was in the process of implementing a client / server messaging and application environment, and required guidance to support their internal resources.

#### **Responsibilities and Accomplishments:**

**Position:** Senior Technical Advisor / Facilitator / Executive Trainer (Management Consultant)

- Engaged to document a Client / Server Architecture and Deployment Strategy and educate / train Mitel technical and management resources on how to implement a Client / Server environment corporately through a series of discussion forums
- Documented the Mitel technical architecture, information management, electronic messaging, development and implementation methodology, application development guidelines, training and support requirements, and mail migration strategies

#### **Technical Environment:**

- Lotus Notes R3, Windows NT, MS Office

#### **Engagement 11: COMMUNICATIONS SECURITY ESTABLISHMENT (CSE)**

**Initiative:** Implementation of a Client / Server UNIX Environment with Customized Mail Pilot

**Timeframe:** May 94 to Sep 94 (Part Time)

**Budget:** 3 Resources

**Methodology:** DMR Productivity Plus

**Risk Assessment:** High Risk

#### **Background:**

CSE was rapidly deploying Open / Distributed systems based on widely accepted industry standards, and wanted to evaluate Client / Server.

#### **Responsibilities and Accomplishments:**

**Position 11a:** Senior Project Manager

- Prepared, delivered, and negotiated the proposal and project approach with the client
- Documented and maintained the Project Charter, Business Case, Stakeholder Analysis, Project Plan, Exception Reports and Issues Summaries, and Project Management Reports

**Position 11b:** Senior Technical Architect

- Mr. Milsom was engaged to manage the development and implementation of a client / server pilot project on a Sun Solaris UNIX environment that would provide a customized mail system that included some specialized functionality required by CSE

#### **Engagement 10: STENTOR RESOURCE CENTRE INC. (SRCI)**

**Initiative:** Corporate Messaging and Knowledge Management Systems Development

**Timeframe:** Feb 94 to Feb 96

**Budget:** \$7,500,000 + (SISC's Resource Budget) / \$20,000,000 + (Total IM / IT Budget Managed)  
25 Resources

**Methodology:** DMR Productivity Plus

**Risk Assessment:** High Risk

**Background:**

After SRCI's creation, the IM / IT division identified a need to implement a messaging, knowledge management, executive information system environment utilizing leading client / server technologies that supported both Windows and Apple environments that were bilingual. SRCI at the time was responsible for the project / Programme management initiatives for all of Canada's telecos.

**Responsibilities and Accomplishments:**

**Position 10a:** Programme Manager / Senior Project Manager

- Responsible for establishing the Project Management Office, managing the projects, and the client interaction, architectural reviews, and delivery of the projects
- Due to the success of the systems implemented, Mr. Milsom's team grew from four resources to a team of 25 developers, administrators, testers, and support staff for SRCI's IM / IT Systems over a two-year period
- Most of the systems were rolled out across all of the provinces and territories of Canada, and all were fully bilingual
- Some of the successfully implemented systems and engagements Mr. Milsom was responsible for included:
  - Client / server Application Quality Assurance
  - Distribution Channels Architecture and Application Development
  - Single Living Electronic Document Prototype
  - Inventory Control System
  - Client / server Infrastructure Systems Maintenance and Modification
  - Program Office Information System (POIS) Review
  - Client / server Applications Development Guidelines
  - Service Order Entry System
  - Application Initiation Process and System
  - Help Desk

**Position 10b:** Senior Systems & Technical Architect

- Engaged to develop corporate messaging, groupware, knowledge management, and executive information systems

**Position 10c:** Senior Advisor (IT Asset Management Advisor)

- Mr. Milsom was responsible for the architecture, implementation strategy and design of the Inventory Control System which provided a base level IT Asset Management repository for DCE software and systems

**Engagement 9: PRIVY COUNCIL OFFICE (PCO)****INDIAN CLAIMS COMMISSION (ICC)**

**Initiative:** ICC EIS Programme

**Timeframe:** Jul 92 to Jan 94

**Budget:** \$5,100,000 + (SISC's Resource Budget) / \$15,000,000 + (Total IM / IT Budget Managed)  
15 Resources

**Methodology:** DMR Productivity Plus

**Risk Assessment:** Medium Risk

**Background:**

ICC was established in 1991 as a Royal Commission of Inquiry mandated to help First Nations and the federal government settle claims. It was immediately identified that the Commission would require an integrated knowledge management, groupware, messaging, executive information suite of systems that would allow the Commission to efficiently share and manage its documentation and research.

**Responsibilities and Accomplishments:**

**Position 9a:** Programme Manager / Senior Project Manager

- Mr. Milsom was responsible for the successful execution of a series of IM / IT projects related to the design and implementation of their messaging and executive information systems. These projects included:
  - Phase 4.0: ICC Records Management Change Request
  - Phase 2.5: Client / server Design / Development / Population / Integration of the Claims Historical Document Name Index System
  - Phase 3.0: Client / server Design / Development / Population / Integration of the Claims Management System
  - Phase 2.4: Upgrade Lotus Notes Infrastructure (Servers and Clients) to Release 3.0)
  - Phase 2.3: Implementation of UI Standards and Upgrade / Modification of Mission Critical ICC Client / server Systems in Preparation for the Case Management System

- Phase 2.1: Upgrade to Lotus Notes 2.1a, Design / Develop / Populate / Integrate the Liaison Units Organization Calendar, the ICC Personnel System, Integrate the Lotus Notes Document Imaging (LN:DI) component into the Records Management and Research Systems, Provide a Training Program and Documentation for ICC Staff, and ensure the systems were ready for Release 3.0
- Phase 2.2: Data Entry for Primrose Lake Claim and Correspondence Scanning into LN:DI
- Phase 2.0: Upgrade to Lotus Notes 2.1 and Integrate the Toronto Office into the ICC Notes Network and Design / Develop / Populate / Integrate the Claims Research Tracking and Audit System, Contact Management System, Commissioner's Claim Bulletins System, ICC Forms and Templates System, and the On-line Notes Change Request System
- Phase 1.0: Implementation of ICC Lotus Notes 2.0 Environment, Documentation of an ICC Information Management Strategy Roadmap, Design and Development of the Records Management and Correspondence Control System, IT Asset Management Roadmap and Strategy, documentation of the client / server UI and development standards
- Mr. Milsom established the project management office (PMO) and help desk
- Mr. Milsom was responsible for the project management, client interaction dealing with the Chief Commissioner and the Commissions' Head Administrator and delivery of the projects
- Mr. Milsom was responsible for designing and executing training programs for staff and ICC executive on the technology and re-engineered business practices
- Mr. Milsom was awarded a Letter of Commendation from the Chief Commissioner ICC for his role in leading the successful IM / IT Initiatives at the Royal Commission

**Position 9b:** Senior Systems / Technical Architect

- Mr. Milsom worked on establishing the ICC client / server messaging and groupware environment and documentation of an ICC Information Management Strategy Roadmap
- Engaged to develop corporate messaging, groupware, knowledge management, and executive information systems
- Responsible for the architectural and technical reviews, recommending IT purchases for hardware and software for head office and the regional offices, development methodologies and standards and interface specifications,

**Position 9b:** Senior Advisor (IT Asset Management Advisor)

- The Royal Commission Chief Administrator had expressed concerns regarding the extensive distribution of Notebook Computers to staff and commissioners, and wanted an IT Asset Management Roadmap and Strategy for tracking DCE hardware and software
- Mr. Milsom was personally responsible for the strategy and approach, architecture of the tracking system and processes, and leading the implementation team

**Technical Environment:**

- Lotus Notes R2.# & R3, WordPerfect 5.1 & 6.0, Lotus SmartSuite, Lotus Notes Document Imaging (LN:DI), MS Windows 3.1, MS Windows NT 3.1

**Engagement 8: ELECTIONS CANADA (EC)  
INFORMATION TECHNOLOGY BRANCH**

**Initiative:** Third National Referendum Study

**Timeframe:** May 92 to Jun 92

**Background:**

The project team was contracted to assess the Referendum Readiness state of Elections Canada, and prepare a position report for the Chief Electoral Officer. This study included reviews of the Operational, Financial, Human Resources, and LAN System Infrastructure. The study concentrated on the ability of Election Canada's Informatics Infrastructure to support an Electoral Event, in particular a Referendum (as it was anticipated that this would be the most immediate Electoral Event).

**Responsibilities and Accomplishments:**

**Position:** Management Consultant / Project Lead

- Senior Systems Analyst \ Technical Writer responsible to conduct the research and interviews for the assessment
- Involved in the development and presentation of the position report, and lead presenter to the Chief Electoral Officer

**Engagement 7: ELECTIONS CANADA (EC)  
STRATEGIC PLANNING AND INTERNATIONAL SERVICES BRANCH**

**Initiative:** Key Indicators Project

**Timeframe:** May 92 to Jun 92

**Background:**

Elections Canada is an independent, non-partisan agency reporting directly to Canada's Parliament. Its ongoing concern is to fulfil its responsibility to ensure Canadians can exercise their choices in elections and referendums in an open and impartial process. This engagement was to conduct the preliminary analysis and to construct a System Architecture and Implementation Plan to measure Election Canada's (EC's) progress through an electoral event (Federal Election or Referendum). This assignment involved the identification of key indicators critical to the success of an electoral event, the expected measurements, an infrastructure to collect these measurements, and a system to report the on-going status of an Electoral Event to senior management

**Responsibilities and Accomplishments:**

**Position:** Management Consultant / Project Lead

- Responsible to conduct the research and interviews for the preliminary analysis, and was a senior member involved in the development and presentation of the System Architecture and Implementation Plan. These tasks were accomplished under severe time constraints, and the recommendations of the task force were implemented.

**Engagement 6: DEPARTMENT OF NATIONAL DEFENCE (DND)  
DIRECTOR FINANCIAL SERVICES (DFINS)**

**Initiative:** Integrated Revenue Transactional Tracking System (IRATTS)

**Timeframe:** Feb 92 to Apr 92

**Budget:** 5 Resources

**Methodology:** Merise Methodology

**Background:**

The project involved the design and prototype for IRATTS, with five senior consultants. The objective of this project was to model and define the revenue business system at DND and to propose a more streamlined and efficient automated system. The design followed the Merise methodology and was supported by the design tool, PacDesign.

**Responsibilities and Accomplishments:**

**Position:** Project Manager / Senior Systems Analyst

- Senior Systems Analyst engaged to lead and work on the Business Case, the Logical Process and Data models, and the External Design Specifications for this system, following the Merise (CGI) methodology
- Involved in the research, analysis, and development of the Business Case, Conceptual Process Models, Conceptual Data Models, External Logical Process Models, Logical Data Models, prototype screen designs, and Quality and Assurance of the prototype

**Engagement 5: DEPARTMENT OF NATIONAL DEFENCE (DND)  
DIRECTOR PAY SERVICES (DPS)**

**Initiative:** Military Foreign Service Regulations (MFSR) Automated Support System

**Timeframe:** Nov 91 to Jan 92

**Budget:** 4 Resources

**Background:**

The system was an automated Support System for the Military Foreign Service Allowance Section of DPS. This contract was part of the DPS undertaking to analyze and implement a "Forms Support System" Prototype for certain key sections within the Directorate. This phase involved developing and implementing a Clipper (X-Base) system, which would automate the MFSR calculation process, and allow the units to perform the calculations themselves. This system was developed to make the Foreign Service Allowance System more efficient, accurate, and reduce departmental costs in person hours.

**Responsibilities and Accomplishments:**

**Position 5a:** Project Manager

- Engaged to project manage a project team of two developers and one tester, as well as act as lead architect for the MFSR system
- The project was developed ahead of schedule and within the cost allocation

**Responsibilities and Accomplishments:**

**Position 5b:** Technical Architect

- Responsible for the Requirements Specification, Architectural Design Specification, and the External Design Specification

**Engagement 4: DEPARTMENT OF NATIONAL DEFENCE (DND)****DIRECTOR PAY SERVICES (DPS)****Initiative:** Office Automation System (OAS) LAN Directorate Macro Development**Timeframe:** Mar 91 to Oct 91**Budget:** 3 Resources**Background:**

This study and prototype evaluation was a component of the Automated Data Processing (ADP) modernization plan for the OAS system with National Defence Head Quarters (NDHQ). For this project, DND established several test sites to evaluate the prototypes for the proposed plan.

**Responsibilities and Accomplishments:****Position 4a:** Project Manager

- Contracted to manage a team to perform a series of studies and reports for DND, dealing with the Office Automation System for ADM(Fin) and ADM(Mat), and to evaluate options for future development in emphasizing short term cost effective Office Automation Opportunities

**Responsibilities and Accomplishments:****Position 4b:** Technical Architect

- Personally responsible for completing the following reports: an opportunity evaluation, preliminary analysis, requirements analysis, and performance and compatibility analysis

**Engagement 3: DEPARTMENT OF NATIONAL DEFENCE (DND)****DIRECTOR OF COSTING SERVICES (DCOSTS)****Initiative:** Information Technology Blueprint**Timeframe:** Sep 90 to Feb 91**Budget:** 3 Resources**Responsibilities and Accomplishments:****Position:** Project Lead / Technical Architect / Senior Systems Analyst / System Administration

- Based on the success Mr. Milsom had with managing and optimizing the DMOS Banyan VINES LAN, he was assigned the responsibility to evaluate the DCostS information support services and LAN configuration in support of their Information Technology Blueprint, and manage a team of 3 senior technical resources
- During this engagement, besides helping to optimize the DCostS LAN, Mr. Milsom conducted a series of technology and product assessments and pilots of document management and information management systems (including Lotus Notes R1) to help the Directorate's IM / IT Blueprint

**Engagement 2: DEPARTMENT OF NATIONAL DEFENCE (DND)****DIRECTORATE OF MILITARY OCCUPATIONAL STRUCTURES (DMOS)****Initiative:** Military Occupational Structure Support System (MOSSS) Local Area Network (LAN) Re-engineering**Timeframe:** Jan 88 to Aug 90**Background:**

During this period, the MOSSS DND Military Human Resources database was being re-engineered, and there was a requirement to implement the Banyan VINES LAN, and supporting software to support this system.

**Responsibilities and Accomplishments:****Position 2a:** Local Area Network (LAN) Manager / IT Asset Manager

- Mr. Milsom was contracted to design, install and configure a Banyan VINES LAN for over 50 users accessing the MOSSS Human Resources database
- In order to meet strict time constraints imposed by the overall project schedule, Mr. Milsom was responsible for managing and leading a sub-project schedule to co-ordinate a number of consecutive and concurrent activities including modeling data flow, mapping physical layout and wiring, analyzing user groups and profiles, evaluating potential applications for inclusion on the network, configuring and documenting the LAN, and developing operating procedures and manuals
- Among the contracted deliverables Mr. Milsom was responsible for was a detailed schedule for continuing network improvement so that functionality required by the MOSSS could be supported

- Mr. Milsom evaluated the major Automated Project Management Systems (Superproject Expert, Microsoft Project, Instaplan 5000, Harvard Total Project Manager and Time Line) for user interface and output quality, and recommended the purchase of Time Line 4
- Several new configurations tested out and introduced by Mr. Milsom for DMOS were incorporated in other DND Banyan VINES networks as they allowed more memory for applications to run
- As part of the engagement, Mr. Milsom was also assigned responsibility for IT Asset Management for DCE workstations and software, and the server hardware and software licensing and warranty management, taking into account everything from acquisition to IMAC to disposal.
- Mr. Milsom's contract was extended twice, before a new DND resource could be trained up to take over the infrastructure

**Position 2b:** Help Desk Manager / Trainer

- Mr. Milsom designed and provided training on the corporate systems and LAN, and managed the DMOS Help Desk

**Engagement 1: DEPARTMENT OF NATIONAL DEFENCE (DND)**

**DIRECTORATE FINANCIAL SERVICES (DFINS)**

**Initiative:** Local Area Network Banyan Vines Network Support Services

**Timeframe:** Mar 87 to Dec 87

**Responsibilities and Accomplishments:**

**Position:** IT Asset Management Team Lead / Local Area Network Support / Help Desk Support

- Team lead managing three other support personnel
- Engaged to provide network and client service support on Banyan Vines local area network
- As part of the engagement, Mr. Milsom was also assigned responsibility for IT Asset Management for DCE workstations and software, and licensing and warranty management, taking into account everything from acquisition to IMAC to disposal.
- Provided Lotus 1-2-3 client support, as well as general computer systems help desk support

## **RELEVANT COURSES / SEMINARS / DESIGNATIONS**

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- ISACA COBIT Foundation Course and Certificate, 2010
- APMG Programme and Project Sponsorship Certification (PPS/000179), 2009
- APMG ITIL V3 Service Catalogue Practitioner (APMG SCR/000008), 2009
- APMG ITIL V3 Service Catalogue Practitioner Course, Burlington, 2009 (Pink Elephant – 3 days)
- APMG ITIL V3 Foundations (2 days), 2009
- CMC Certified Train-the-Trainer, Essentials of Management Consulting (1 day), 2009
- APMG Portfolio, Programme, Project Office Certification (P3OR/000149), 2009
- APMG Accredited PRINCE2 Examination Proctor, 2009
- Certified Management Consultant (CMC) Designation from CMC-Canada 2008
- DSDM Atern Agile Project Delivery Methodology Certification, Toronto, 2008 (DSDM/000220)
- Certified Information Systems Auditor (CISA) Training (5 days), Ottawa, 2008 (Exam passed in June 2008)
- APMG Management of Risk (M\_o\_R) Practitioner Certification, Edinburgh, 2008 (MOR/03071)
- APMG MSP Advanced Practitioner Certification, Edinburgh, 2008 (MSPR/19837)
- APMG Managing Successful Programmes (MSP) Advanced Practitioner Course (7 days), Edinburgh, 2008
- APMG PRINCE2 Practitioner Course and Certification (5 days), Ottawa, 2007 (P2R/245537)
- ISEB MCITSM ITIL Service Manager Master Course and Certification (20 days), Ottawa, 2007 (990180430)
- Certified IT Asset Manager (CITAM, 5 days), Washington DC, 2007
- Software & Information Industry Association (SIIA) Certified Software Manager (CSM, 3 days), Toronto, 2007
- EXIN ITIL Foundation (2 days), Ottawa, 2007 (96564)
- ProjectWorld Conference, Ottawa, 2003 / 2004 / 2005
- PMI PMP Certification, 2003 (Received PMP Certification on April 16, 2003, # 65326, next renewal: 15 Apr 2013)
- Cheetah Accelerator Course for the PMP (5 days), 2003
- Primavera Technical Installation Training (3 days), Toronto, 2002
- Primavera Advanced Training for Project Planner for the Enterprise (2 days), Toronto, 2002
- ProjectWorld Conference, Toronto, 2002
- Project Management Institute (PMI) Member, Ottawa PMI Chapter Member, 2001
- Project Management Professional (PMP) Certification Seminar, 2001
- Domino and WebSphere Integration, New York, 2000
- Bates Project Planning and Control & Organizing People for Projects (5 days), Ottawa, 2000
- IBM's Human Factors Course (5 days), New York, 2000
- Solution Selling, Ottawa (5 days), 1999
- IBM Human Factoring (10 days), New York, 1999
- Changepoint Remind and Involv (Sales & Marketing, Technical Training, End User Training), Ottawa 1998
- EntreVision EntreWeb and Advanced Domino Training, Ottawa, July 1997
- Lotus Notes Business Partner Forum for Domino Technologies, Cambridge, 1997
- Lotus Notes Application Development AD2, Ottawa, 1996
- Lotus Notes Release 4, Lotus Development Canada; Toronto, November 1995.
- Accelerated Value Method Train the Trainer; Paris, France, November 1995
- Accelerated Value Method (ALL COURSES), Lotus CSG, Toronto, April 1995
- Workflow and Groupware Technologies Seminar, Boston, March 1995
- IBM's Human Factors Course, Ottawa, 1994
- Large scale IM / IT Planning and Deployment Seminar, Ottawa, 1994
- CSG's Lotus Notes Full Suite of Courses (12 days) for versions 2.1 (Toronto, 1993) and 3.2 (Ottawa, 1994)
- IBM LotusSphere / WebSphere Conference 1995, 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003
- Microsoft's Supporting MS Windows NT Server 95 and System Admin for MS SQL Server for MS Windows NT, Ottawa

## **ASSOCIATIONS / MEMBERSHIPS**

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- CMC-Canada
- Information Systems Audit and Control Association (ISACA)
- International Association of Information Technology Asset Managers (IAITAM)
- Best Practice User Group (BPUG)
- IT Service Management Forum (itSMF) Canada (National Capital Region)
- Project Management Institute (PMI)

**End Document**