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## SUMMARY OF PROFESSIONAL SKILLS

Extensive experience with project management (PM) in business, government, and industry, specializing in technology and the financial industry during the past 11 years. Lead comprehensive assessments of IT and business-side requirements. Execute projects that have resulted in award-winning programs for Fortune 500 and other companies. Projects have included the following: recommending strategies & tactics to senior management; analysis of vendor outsourcing & build or buy solutions; project initiation & direction start-to-finish; instructional design for training & project rollout; vendor management & communications; business continuity & disaster recovery. Specialty in the following areas:

Integrated business & IT-side needs assessments  
Critical business functions impact analysis (BIA)  
Results-driven timeline with under budget delivery  
Workshops connecting IT with business partners  
CBCP certified: Business Continuity Planning (BCP)

IT vendor outsourcing & performance management  
Instructional or process design & training  
Specialized documentation (RFP, SOW, etc.)  
Pre-project research & post-project UA testing  
Disaster Recovery (DR) & Incident Command

## PROFESSIONAL HISTORY

**BCM Consultant, EVault, Inc., a Seagate Company, Emeryville, CA**

2007 - 2008

Supported clients in San Francisco area in IT vendor relationships and strategic solutions for continuity planning and disaster recovery, particularly with the vendor Eze Castle Integration (ECI). Specialized in coaching IT vendors in business-side documentation and communication regarding strategy and tactics for technical environment restoration, including virtual DR remote site access and multiple data center solutions. Developed innovative BCP / DR engagement methodology as a companion offering to EVault's leading edge technology products and solutions: data protection and online backup with 24 x 7 x 365 disk-to-disk technology solutions for Seagate's global customer base. Led the following projects for the Business Continuity Management (BCM) Practice and Seagate Marketing (Santa Clara, CA): client delivery projects including plan development and other BCM services in the form of workshops and managing internal client staff to execute deliverables through RFP / SOW (Statement of Work) process; methodology projects, to create IP (intellectual property) for BC / DR in the form of white papers, instructional guides, and project tools for BC clients & data protection (product sales) customers; instructional design and delivery projects, resulting in plan templates, project execution tools, presentations, and implementation of controls for risk mitigation; collaborative projects, resulting in marketing and conference materials used online, at conferences, or by other departments at EVault or Seagate.

**A. Roberts Consulting, San Francisco Bay Area, CA**

2004 - 2007

Specialize in needs assessment and project design & implementation for solid strategy development to mitigate risk by enhancing technology controls. Offer the following project management related services: technical and business-side BIA (Business Impact Analysis) to ensure sustained operations and resilience through IT capability precisely tailored to what IT supports in an organization. Present findings and propose solutions to ensure organization's annual goals are met while mitigating risk & exposure. Manage multiple projects with internal staffing where necessary to implement strategic goals over short or long-term (years) plans. Analyze critical data, present findings, and gather all business partners to implement collaborative solutions in tailored project plans. Where necessary, offer solid, hands-on instruction to improve performance in many areas, including problem solving, planning, project management, team training, communications, emergency management, critical functions & systems documentation, and IT team support. Assist leadership of organizations to increase revenue and gain shareholder / stakeholder endorsement by presenting project rationales and metrics in clear, non-technical formats backed by user acceptance data & test results. Also provide training in project management, instructional design, education, and IT communications. Implement any type of project (also lead teams).

**Director, Business Continuity Planning, Charles Schwab & Co. San Francisco, CA**

1997 - 2004

Collaborated with IT leadership (Gee Kin Chou & David Kessell) from 2001 to 2003 to lead a landmark project, resulting in a master summary of cross-enterprise critical functions delineating IT applications and systems that support high criticality functions across the firm. Proposed and built a comprehensive BCP Program from 1998 to 2003, including an Emergency Recovery Coordination (ERC) team, an Incident Command Center, and a 55-business unit Recovery Team Structure. Led Brokerage Operations' successful recovery during numerous business resumption events in role of Enterprise Recovery Coordinator (ERC). Achieved leadership and service awards for outstanding risk mitigation and disaster

recovery. Directed Program and Team under budget, and far exceeding annual goals set in 5-year Plan. Responsible for research, analysis, presentation, data integrity, planning, documentation, repositories, data management, team building, training, user acceptance; IT critical functions testing, off-site testing; emergency coordination, crisis management, and recovery for 55 units and senior management in a 2000-plus employee enterprise. Advised senior management in US Trust Operations (New York and Jersey City) after merger and during New York power outage in August 2003.

**Senior Analyst, University of California / Berkeley, Accounting & Mail Services Divisions** 1996 – 1997

Researched & analyzed technical performance data for Accounting Director. Created communications exercises that increased productivity & employee satisfaction on the job. Researched & interpreted technical and marketing data for Mail Services Director to fund & create program that increased sales and awareness of departmental offering. Enhanced employee performance in Mail Services using research data to redesign work process models. Created newsletters and marketing events to increase sales. Wrote training program & user manual for US *Zip-Plus-Four* project, winning national award. Responsible for technical training, research, analysis, & presentation of solutions to enhance departmental offerings, including marketing, advertising, customer events, and customer service. Assisted Director in all MSC projects.

**Senior Consultant, Shipley Associates / Bountiful and Salt Lake City, UT** 1984 – 1996

Trained technical and management teams to communicate with each other as well as senior management in written or oral presentations and reports. Developed specialty in “translating” technical writing and communications for business-side users and decision makers (example: Coaching technical experts to rewrite chapters of *Nuclear Regulatory Commission / Hansford Study* so that congressional evaluators could understand key points impacting proposed sites. Projects included client delivery and instruction for *all* types of technical situations, including documents such as, authority for expenditure (AFE), proposals (RFP), statements of work (SOW), project charters, procedures, technical & IT descriptions / documentation, status reports, executive summaries, power point presentations, etc. Responsibilities also included research & analysis, program & project development, instructional design, developing chapters in the *Shipley Style Guide*, and documenting read-ability re-design (i.e. revising chapters, for example, in the Nuclear Regulatory Commission document so that non-technical users could understand the text).

**Lecturer, English Department & Honors Program, University of Texas at Austin** 1981 – 1984

Researched, designed, and taught undergraduate courses in technical writing, composition, and literature as Dr. Mary Jo Roberts. Developed & taught courses in the novel, comparative literature, women’s studies, popular culture, and *The American Experience*, a year-long honors course with interdisciplinary faculty. Also researched and taught composition to enhance reading and writing skills for non-university qualifying students at Austin Community College, St. Edward’s University, and the University of Texas Summer Remedial Program (all educational venues in Austin, Texas).

**CONSULTING / PARTIAL CLIENT LIST \***

Seagate / EVault	General Motors
Charles Schwab & Co. (1988 – 90)	Bureau of Land Management (Denver)
Forward Funds & ReFlow (Sutton Place)	Environmental Protection Agency (Washington, D.C.)
Artis Capital & Seasons Capital Management	Los Angeles Water & Power
Larry Stupski Foundation (for Vikiwi, Inc.)	Shell (Alternative Fuels Project)
University of California at Berkeley	Nuclear Regulatory Commission (Text Analyst)
Advanced Tachyon Technologies (Santa Rosa, CA)	Federal Reserve (San Francisco)
Martin Marrietta Aerospace	University of Texas at Austin

**EDUCATION & CERTIFICATION**

**Education:** Ph.D. English with Honors / Specialty in Technical & Expository Writing, University of Texas / Austin, 1981.

**Professional Certification:** CBCP (Certified Business Continuity Professional) / Disaster Recovery Institute International, up-to-date 2008 ff. PMI (Project Management Institute) certification in progress.

\*Charles Schwab & Co. / Consultant from 1988 – 1990. Director / Project Manager from 1997 to 2004. Detailed description of consulting services and responsibilities available upon request in Client List.