

Rolando Hernandez

Business Rules and Decision Management Architect

Dallas, TX / Miami, FL 214-810-6585 Jobs2014@BizRules.com

Summary

- Business Rules and Decision Management Architect, BIZRULES – 1995-Present – Fortune 500 experience.
- Helped design the global strategy for Business Rules and Decision Management at Mobil Oil, IRS, and GE.
- Principal Architect guiding large financial services firms to adopt Business Rules Management (BRM), Business Process Management (BPM), Decision Management (BDM), and Service Oriented Architecture (SOA).
- Helps companies minimize risk and ensure success of Business Rules Management, and Decision Management governance, systems, strategies, standards, methodologies, and projects.
- Translator between two different tribes: Business and IT.

Industries and Clients

- Global Investment Banking, Mortgage – Goldman Sachs, Wells Fargo.
- Finance, Tax, Governance, Risk, Compliance (GRC) – IRS, Daylight Forensics, General Electric.
- Retirement Programs: Social Program Mgmt. (SPM) – IRS, Social Security, South Carolina Dept. of Revenue.
- Consulting: IBM, EDS, Sapiens Americas DECISION Management Consultant.
- Insurance (P&C, Life, Policy Admin) – SUNGARD, Allstate, Chubb, USAA.

Business Rules and Decision Management Expertise

- Decision Modeling for FINRA, KYC, and AML compliance at Goldman Sachs.
- Business Rules Architecture and rules modeling for Finance/Tax policy and compliance rules at General Electric.
- Defining enterprise-wide Decision Management and Business Rules Management solutions.
- Developing rules, decision, and process management methodologies, standards, and best practices.
- Creating governance processes for data, rules, and decisions.
- Creating enterprise architecture frameworks for modeling rules, decisions, processes, and complex events.
- Building center of excellence / center of practice for business rules and decision management.
- Lead proof of concept (POC) projects to select rule/decision engines tools.
- Manage business rules harvesting, business requirements, technical specs, and rules/decision modeling.
- Lead design, business architecture, technical system design, and Agile/Scrum development projects.
- Work closely with business partners, executives, and subject matter experts to define/document solutions.
- Work closely with technical IT development, QA, operations staff to create technical specs, test plans.
- Architecting rulebases, designing rules-based systems, harvesting rules, and modeling decisions.

Technology Skills and Platforms

- **Decision Management:** Decision Modeling, decision architecture, data quality modeling using Sapiens DECISION Analytics and Decision Management System. Decision Modeling Notation (DMN) and The Decision Model (TDM).
- **Rules Management:** Designing rulebases and rule engine solutions for these Business Rules Management Systems: IBM Operational Decision Management (ILOG ODM JRULES); PegaRULES Process Commander (PRPC); FICO Blaze Advisor BRMS; Oracle Policy Automation (OPA/Haley Rules/SoftLaw); Red Hat JBoss BRMS (DROOLS); Progress Corticon BRMS; BOSCH Visual Rules BRMS; Microsoft BizTalk BRE, CA CleverPath AION BRMS.
- **Process Management:** BPM: Pegasystems PegaRULES Process Commander (PRPC), and IBM BlueWorks Live.
- **Process Modeling:** Business Process Modeling Notation (BPMN), UML, Visual Modeler, Visio, Oracle Designer.
- **Requirements Management:** Rational Rose, Rational Unified Process (RUP), IBM ReqPro, RequisiteWeb, DOORS.
- **Data Modeling:** Conceptual, Logical, and Physical Modeling. CA Erwin.
- **EA Modeling & Simulation:** IBM System Architect (Telelogic/Popkin), NoMagic, CaseWise, and Gensym ReThink.
- **ERP:** ORACLE GL AP AR PO. QuickBooks. SAP ERP. UNSPSC. **EH&S:** SAP ECC, EHS, EHSM, EH&S.
- **Document Management:** EMC Documentum, SharePoint.
- **MS Office:** Project SharePoint Word Excel Visio PowerPoint Access OneNote.
- **Agile Scrum:** JIRA, Rally issue/project tracking.

Education, Citizenship, and Languages

- M.S. – Master of Science, Computer Information Systems with a Concentration in Artificial Intelligence, 1988.
- B.S. – Systems Analysis, 1986. Both degrees from the University of Miami School of Business.
US Citizen. Bilingual–Fluent in English & Spanish. Can travel– Int'l. exp: England, France, Japan, Brazil, Canada.

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Experience

- 15+ years hands-on experience modeling decisions, rulesets, and writing rules using Business Rule Authoring tools, decision tables, decision trees, IF THEN rules, scorecard rules, inference rules, and expert rules.
- 15+ years in software development: Mainframe, Windows desktop, web and mobile/tablet distributed application architecture, rulebase architecture and design.
- 15+ years consulting: IBM, EDS, and Sapiens.
- 10+ years documenting, modeling, documenting, and designing Java/J2EE rules-based apps.
- 10+ years leading analysts/developers, and managing waterfall/agile/scrum development projects.
- 8+ years designing Enterprise Architecture (EA) frameworks, Service Oriented Architectures (SOA), Business Architectures (BA), and Object Oriented Architectures (OOA).
- 15+ years designing Rule-Based Systems for: Global Statutory Compliance (Sarbanes-Oxley), Tax Planning & Minimization, Corporate Income Tax Processing, Legal Entity Management, Corporate Formalities & Separateness, CIT Tax, Withholding Tax, VAT Tax, HQ Cost Allocation, Transfer Pricing, Advance Pricing Agreement (APA), Billing, AR/AP, Revenue Management, Yield Management, Commissions, Sales Force Automation, Supply Chain Management, Commercial software for Life Insurance, Financial Planning, Pension, CRM and DECISION.
- Thorough understanding of object-oriented, functional, declarative, and procedural programming languages/methods.

Consulting Experience – Sample BIZRULES consulting projects, 1995–Present

- **Help companies modernize legacy applications and design new apps using breakthrough technologies** BPM, Decision Management, Rules Management, Big Data, Predictive Analytics, Data Mining, KM, AI, and ES.
- **Developed the BIZRULES® VISION™ Business Rules Methodology** for documenting, managing, and automating rules and processes, and for preserving expert knowledge. Used by Mobil Oil, IRS, and General Electric.
- **Three of the Fortune 10 use my [BIZRULES methodology](#) for Rules Management and Knowledge Management.**
- GE Business Architect – 10 years experience as GE Tax Enterprise Architect, and Decision/Rules Architect. Designed GE Rulebased-Decision architecture, Rulebase architecture, and BPM methodology for GE's Tax Knowledge Supply Chain. Helped GE "Write the Rules" of Tax Compliance, Tax Minimization, and Tax Compliance.
- IBM's Business Rules Subject Matter Expert on the IRS PRIME Business Systems Modernization Program. Worked with IBM to develop the winning RFP for the CADE BRE solution in this 15-year \$10 billion system modernization program. Helped design the rules architecture, methodology, and strategy for harvesting and programming the 250,000 business rules that process all US IRS Individual Taxpayer tax returns (IRS 1040 Forms). Helped transform the tax agency from a paper-pushing system to an interactive online program for taxpayers, and deliver tax refunds in as little as two days instead of five weeks. www.bizrules.com/clients_USIRS.htm.
- IBM Operational Decision Management Business Policy Analyst – IBM's business rules analyst on the IBM ILOG ODM team building a state-of-the-art rules-based CRM Loyalty Management System for a \$20B retail/online store.
- EDS Database/Rules Programmer on the \$400 million Canada Social Security System Modernization Project. Coded the Pension Eligibility and Entitlement Adjudication Rules and Data Queries. Policy Management System delivers \$30 billion in pension benefit checks to 10 million retired and disabled Canadians yearly. Rulebase processes 120 million payment transactions/yr. Error & fraud reductions due to new Rulebase of \$45 million/yr. or \$703 million/15yrs. www.bizrules.com/clients_CADISPR.htm.
- Database Architect / Rulebase Architect – Responsible for data analytics, data governance, data quality, validation, transformation, data cleansing, standardization, big data, business intelligence, and data-based decision-making.
- Data Coach – Experience creating terms, definitions, relationships, concept/fact models, semantic models, logical, physical, and meta-data models. Designing rules for governance, obtaining data, assembling data, retrieving data, data processing, reporting, data validation, data quality, cross-field relationships, ETL, data formatting and mapping.
- Burger King HQ – Senior Project Manager.

Employee Experience – 1988-1997, 2013

- DECISION Architect at Sapiens Americas, an Insurance Software and Financial Software Vendor – Decision Modeling for FINRA, KYC, and AML compliance at Goldman Sachs. Decision modeling and Data Quality Modeling on a Mortgage Rules Modernization project at Wells Fargo. Member of Sapiens professional services team implementing Sapiens DECISION Analytics & Decision Management System. (2012-2013)

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- SUNGARD/Financial Data Planning – Systems Development Manager. Led the 10-member SW R&D Team at FDP, a \$30M SW developer for Life Insurance, Policy Admin, Financial Planning, Pension, and CRM apps. (1996-1997)
- Pepsi-Cola BAESA Brazil – Senior Project Manager. Reporting directly to the CIO of Pepsi's largest bottler outside the USA, managed implementation of \$300M Pepsi System 2000 Sales & Supply Chain Mgmt. System. (1995)
- Mobil Oil HQ – Knowledge Engineer, Programmer. During six years at Mobil Oil Marketing & Refining Division, helped design and deliver Mobil's Global Knowledge Management and Rules Management Strategy. (1988-1994)

Project Manager, Rules/Decision Architect: BIZRULES

- Consultant to CXO, VP, and Director level executives implementing state-of-the-art Rules/Decision technology.
- Trusted advisor to business executives, IT directors, and SMEs: Finance, Tax, Marketing, Sales, Legal, Risk, IT, etc.
- Recognized subject matter expert in Rules Management, Decision Management, and Process Management.
- Rules Coach guiding large global corporations to manage rules, simplify processes, increase compliance levels (automating rules), gain economies of scale (reusing rules), and reduce time-to-market (rules vs. hard-coding).
- Decision Modeler helps companies make better decisions faster. Rules architect who helps companies manage rules.
- Takes the complexity out, and simplifies IT concepts, so executives understand the value of data, rules, decisions, and process as corporate assets that can be automated to cut costs, improve quality, and make more money.
- Uses data mining, business process, business capabilities, business rules, and predictive analytics to help companies disrupt competition, seize market share, ensure compliance, prevent fraud, and compete on knowledge.

Vision

- Strong understanding of the key challenges facing competitive, global businesses today: compliance, agility, reducing costs, quality, time to market, downsizing, offshoring/outsourcing, privacy, preserving and digitizing knowledge, preventing business mistakes, reducing fines, minimizing legal & financial risks.
- Knack for finding innovative ways to govern data, simplify rules, improve processes, and speed up time to market.
- Exceptional ability to quickly learn new industries, terminology, business rules, processes, and data concepts/models.

Skills

- Proven strategic thinking skills. Driven to build Rule-Based systems that work, change, and last.
- Exceptional interpersonal skills with ability to gain the confidence and respect of senior executives.
- Proven ability to work with all levels of management, and the most senior of Subject Matter Experts.
- Proven ability to communicate with senior leadership and staff at every level of the organization.
- Experience with: Agile/Scrum, Project mgmt., System dev. methodologies; Lean/Six Sigma, Design control plans, Design review based on failure mode, Failure modes & effects analysis, Fault tree analysis, Root-cause analysis.

Capabilities / IT Strategy

- **Tactical IT systems planning:** Design, engineer, manage, build, deliver, support, governance; design reusable data, processes, rules, and decision components. Business process, rules, rulebase, and database strategic planning.
- **Enablement and adoption of new technologies:** Methodologies, processes, tools, standards, and best practices.
- **Project management:** Scoping, estimating, planning, and control. Lead and guide analysts, developers, and testers.
- **Helps companies *Write the Rules of eBusiness***®: Documents rules in a way that both business and IT can understand. Creates rulebases, rulebooks, and rule requirements (decision trees, decision tables, if/then rules) for management approval. Writes strategy rules, ground rules, operating rules, logical rules, and data rules. Creates rule specs for BRE developers, reasoning architecture, rule chaining/inference mode, rule flow, rule firing mode, and answer mode. Designs high-performance real-time OLTP rules and batch rules.
- Creates Rulebooks, Decision Models, Process Models, and Enterprise Architecture Blueprints (e.g. Roadmaps, Concept models, capability models, application design, database design, rulebase design, rulesets, business rules, expert rules, processes, decisions, events, messages, cases, flows, workflows, inputs, outputs, outcomes, UI wireframes, UX (User eXperience), information architecture (IA), enterprise architecture (EA) frameworks, object models, hierarchy models, and reuse models; Business Rules Strategic Planning; Rules Methodology.