Rolando Hernandez

Decision Modeler, Business Rules Architect, Enterprise Architect

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

EXPERIENCE

• Decision modeler who helps companies make better decisions.

• Experience using big data, analytics, data mining, decision models, rules, and processes to help companies disrupt competition, seize market share, ensure compliance, prevent fraud, compete on knowledge, & rule the world.

• Data mining to automatically discover business rules and decision trees from big data (e.g. e-commerce orders, POS transactions, batch transactions, data warehouse). Design predictive models using the rules discovered during data mining.

• Build predictive models that predict what will happen (e.g. pays back the loan, defaults on loan, shops but does not buy, buys, cancels the order, returns the product, equipment breaks, part fails, rain, snow, ice, get audited, fraud).

• Create decision models (using the predict rules in the predictive models) that decide what to do (e.g. approve loan, deny loan, pre-position snow removal/salt trucks, select for audit, detect fraud), or whether to influence what happens (e.g. offer grace period, lower the price, offer a discount, do preventive maintenance or wait until it breaks, reduce audit risk, prevent fraud). Use business intelligence to analyze what actually happened vs. what was predicted.

• Use big data analytics to discover hidden patterns, relationships, and correlations in the transaction data. Collaborate with subject matter experts to analyze the results, and recommend improvements to the rules in the models.

• Follow business rules methodology to create rule models and continuous improvement rules that recommend changes to the predict rules and the decision rules. Use artificial intelligence, rule engines, and decision engines to automatically execute all the rules (i.e. predict rules, decision rules, continuous improvement rules, expert rules).

• Use enterprise architecture to integrate all the components (data, decisions, rules, models, processes, etc.) in a decision-oriented architecture so the whole system works and is aligned with the business strategy.

WHAT CAN I DO FOR YOUR BUSINESS?

• **Enterprise Architecture modeling:** Business Capability Modeling. Process, Rules, and Decision Modeling.
• **Business and technology strategy**: Architecture frameworks, methodology, standards, training, KM COE.
• **Tactical IT systems planning:** Design, engineer, manage, build, deliver, support, governance; BRM/BPM COE, share best practices, design reusable processes, rules, and components. Business rules strategic planning.
• **Enablement and adoption of new technologies**: Methodologies, processes, tools, standards, and best practices.
• **Become a trusted advisor to business executives, IT directors, and SMEs**. Finance, Tax, Legal, Risk, Compliance, Financial products and services, Sales, Customer service, Engineering, Operations, etc.
• **Align IT solutions to business strategy:** Create the enterprise architecture models, frameworks, and blueprints of your As-Is and To-Be models: Business concepts, business capabilities (what); Business processes (how); Strategy, Policy, Goals, business rules, internal transacting/monitoring/reporting rules, external filing/compliance rules (why); Legal entities, hierarchies/structures (where); Schedules, projects, durations, deadlines (when); People, roles, work, workflow, workforce (who); Databases, rulebases, and knowledgebases.
• **Knowledge Engineering:** Knowledge acquisition, knowledge representation, and knowledge management. "Clone" your top experts to automate their decisioning "expert rules," and preserve your Intellectual Capital assets.
• **Build architectures, models and intelligent systems:** AI Bots, Rules-Based, and Knowledge-Based Systems to solve complex problems, maximize revenue, minimize tax, make expert decisions, and outsmart competition.

WHAT HAVE I DONE FOR BUSINESS AND GOVERNMENT?

• **Decision modeler on Sapiens DECISION professional services consulting team implementing decision management software at Goldman Sachs and Wells Fargo.**

• **Helped design the Business Rules, BPM, and KM strategy & methodology for Mobil Oil, IRS, and GE.**

• **IBM's Business Rules SME on the IRS PRIME CADE $10 billion 15-year IRS Modernization Program.**
As a BIZRULES sub-contractor, I was one of IBM's "Key Personnel" on their IRS PRIME contract.

• **Experience working on and/or leading strategic EA, Decision Modeling, BPM, and BRMS projects for GE, Mobil Oil, Pepsi, IBM, EDS, IRS, Goldman Sachs, and Wells Fargo.** Business Rules Architect for large, complex, mission-critical Rules-Based Systems in Fortune 500 firms. Exceptional ability to work with world-class Subject Matter Experts and quickly extract their domain knowledge, business rules, decisioning process, and expertise so it can be documented, digitized, and preserved.

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IBM	BIZRULES subcontract w/ IBM ODM ILOG Professional Services

IBM ODM Business Policy Analyst   Nov. 2013 – Present

- **Loyalty System Modernization Project for a $15 billion Fortune 500 online/retail store chain during M&A.**

- As IBM's business rules analyst on the IBM ODM team implementing Operational Decision Management (IBM ODM ILOG), I represented IBM on-site and worked closely with the client's SMEs to document the business rules and decisions for a new rules-based Loyalty Management System. This included discussing best practices, knowledge transfer, creating templates, deep dive discussions about complex rules and decision logic, designing the promotion rules, terms glossary (BOM), conceptual models, process models, data models, loyalty lifecycle timing/event models, business rules (if/then, decision tables, decisions trees), and decision models.

Sapiens Americas (Financial Services software vendor)	Client sites in NJ and MD

Business Rules Architect – DECISION software   Nov. 2012 – Sep. 2013

- Decision modeling on a Mortgage Rules Modernization project at Wells Fargo. Also worked on a Decision Management POC for FINRA/KYC compliance at Goldman Sachs. As a member of Sapiens professional services consulting team implementing Sapiens DECISION Business Decision Management System (BDMS), gained in-depth hands-on modeling experience using DECISION. Formal/advanced training on DECISION. Advanced training on The Decision Model by KPI thought leaders Barbara von Halle and Larry Goldberg, and training on BPMN by Bruce Silver.

BIZRULES (Founder & CEO)	Miami, FL / Dallas TX

Rules Architect, Decision Engineer, Enterprise Architect   1995 – Present

- **Help Fortune 500 firms modernize legacy applications and design new eBusiness apps using breakthrough technologies Big Data, Analytics, Data Mining, BPM, BDMS, BRMS, BRE, KM, AI, and ES.**

- **Rules Architect & Knowledge Engineer on G.E.'s tax knowledge supply chain: Helped G.E. "Write the Rules" of Tax Compliance & Tax Minimization.** How do you build Tax Apps to help G.E. (1) act with integrity regarding tax obligations, (2) ensure compliance with global tax rules, (3) pay all legally obliged taxes, and (4) meet their responsibility and obligation to shareholders to legally minimize costs?

  You start with 19 rules in the G.E. tax dept. mission statement, the best tax experts in the world, and a knowledge transfer function to capture 1,000's of rules from the minds of the tax experts. Then you digitize the rules in BRE Tax Expert Apps and Smart BPM Apps:

  o My BIZRULES® rules harvesting methodology, knowledge acquisition process, and knowledge engineering process is used to (1) discover, define, document, and model GE's Statutory Tax Compliance Rules and Tax Expert Rules, (2) build GE's tax knowledgebase, and (3) build GE Tax Expert applications.
  o Interviewed GE's tax experts, designed Enterprise Architecture Models, Business Capability Models, Business Rule Models, Expert Rule Models, and Process Models to help GE document, assess, test, and certify that Finance/Tax rules, processes, controls are in place to comply with U.S. GAAP and IFRS tax rules.
  o Designed Business Rules architecture and methodology for GE's e-TAX Digitization Initiative.
  o Documented GE rules for Corporate Governance, SOX, Regulatory and Statutory Tax Compliance in 120 countries, Tax Minimization, CIT, WHT, VAT, Transfer Pricing, Cross-Border Transactions, Entity Management, and Tax Provision. Expert rules ensure tax compliance and reduce tax expense.
  o Rule Harvesting & Gap Analysis of Transfer Pricing Rules for GE Energy, GE Healthcare, and NBC-Universal. Used BIZRULES automated utilities to extract business rules from 17 million lines of code in GE Capital Fleet Leasing app.

  Business Rules Architect on the GE Energy Contractual Modeling System (COSMOS). COSMOS models GE Energy Customized Service Agreements (CSA). Probabilistic models project scheduled maintenance events, unplanned outages, parts repairs, inventory levels, billing, and payment streams throughout the lifecycle of the contract, from Actualization through End of Term (EOT). Helped the GE team harvest and design optimization rules for scheduling planned maintenance and unplanned repairs. Modeled data-based and goal-based rules to determine inventory levels, replenishment method, quantity, and schedule. http://bizrules.com/clients_GE.htm.

- **IBM's Business Rules Subject Matter Expert (SME) on the 15-year $10 billion US IRS PRIME CADE Business Systems Modernization Project.** Developed custom Business Rules Methodology for the IRS. Trained IRS SMEs to write Business Rules; Developed RFP/criteria to assist IRS with BRE selection.

Among the goals are to take the tax agency from a paper-pushing system to an interactive online program for taxpayers, and to deliver tax refunds in as little as two days instead of five weeks. See http://bizrules.com/clients_USIRS.htm.

- **EDS Business Rules Programmer: Designed and programmed business rules for the $400 Million Government of Canada Social Security System Modernization Project.** Coded rules in CA AION CleverPath Business Rules Engine. Error & fraud reductions due to new Rulebase of $45 Million/year or $703 Million/15yrs. See http://bizrules.com/clients_CADISPR.htm.

- **Designed, built & delivered Mobil Oil's Global Knowledge Management Strategy & Expert System Strategy.** Created Mobil's Global Lubricant Knowledgebase (LKB), an integrated suite of intelligent systems, diagnostics systems, product recommenders, and field force automation apps used by Sales Force to seize market share.

- **Developed the BIZRULES® VISION™ Methodology for documenting, managing, and automating business rules and processes, and for preserving expert knowledge.** Used by GE, Mobil Oil, and IRS.
  (Three of the Fortune 10 use my BIZRULES methodology for BPM, BRM, KM, and EA.)

- My clients include GE Capital, GE Energy, Countrywide (Bank of America), CSX, IBM, EDS, Chubb & Son, USAA, Allstate, Penn National Insurance, Daylight Forensics, Burger King, CARFAX, Foot Locker, Cunard Cruise Line (Carnival Cruise Line), Royal Caribbean Cruise Line (http://bizrules.com/clients_cruiseline.htm), the United Stated Internal Revenue Service, Canada Social Security Department, South Carolina Dept. of Revenue, Bexar County Crime Lab (San Antonio, TX), and Office Depot.

- **Model business rules, decisions, and business processes with SMEs using Knowledge Acquisition,** Knowledge Engineering, Business Rules Harvesting; Business Process Redesign, Requirements Analysis, Modeling, and Design; Enterprise Architecture governance, standards, methodology, and best practices.

- **Create Rulebooks, Decision Models, Process Models, and Enterprise Architecture Blueprints (e.g.** 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.

SPECIALTIES: INTELLIGENT SYSTEMS

- **Business Intelligence:** BI, BAO, EDM – Big Data, Analytics, Optimization, Decision Management, Data Mining.
- **Intelligent Systems:** QA – predictive maintenance, problem diagnostics, equipment troubleshooting, selection, configuration, solution optimization, recommenders, intelligent agents, interactive question-answer systems.
- **Artificial Intelligence:** AI, ML, ES, CBR – Cognitive systems, machine learning, machine intelligence, inference, expert systems, expert advisors, production systems; case-based, deductive, probabilistic, deterministic and heuristic reasoning; AI algorithms, AI software.
- **Knowledge Management:** KM, KA, KR, KE, KT, KBS, KB – Knowledge acquisition, knowledge representation, knowledge modeling, knowledge engineering, knowledge transfer, knowledge-based systems, knowledge bases.

INDUSTRY EXPERTISE & FUNCTIONAL EXPERTISE

- Energy, Oil & Gas – Mobil Oil, GE Energy.
- Travel/Cruise – Royal Caribbean, Carnival, Cunard, American Classic Voyages, American Queen Steamboat Co.
- Finance, Tax, Governance, Risk, Compliance GRC – 11 years: IRS, General Electric.
- Finance, Global Investment Banking, Mortgage, Insurance (P&C, Life) – 2 years: Goldman Sachs, Wells Fargo.
- Intelligent systems for product recommenders, customer service advisors, equipment failure diagnostics, oil/lubrication troubleshooting, prognostics, cognitive systems, and preventive maintenance – 5 years at Mobil Oil.
- Federal Govt. Business Systems Modernization – US IRS (Income Tax), Canada ISPR (Social Security).
- Food and Beverage – Burger King, Pepsi-Cola Brazil; Railroad & Transportation – CSX.
- Healthcare / Medical Informatics / Clinical Information Systems – 4 years (High school/College internship).

EDUCATION

- 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.

ATTRIBUTES

- US Citizen. Bilingual–Fluent in English & Spanish. Can travel– Int'l. exp: England, France, Japan, Brazil, Canada.

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BOTTOM LINE

- **As the bridge that brings Business and IT together,** I speak dollars and sense with The Business (strategy, vision, goals, decisions, outcomes, architectures), and bits & bytes with IT (data, inputs/outputs, algorithms).
- **I lead the "Knowledge Transfer Function"** to transfer knowledge, rules, processes, and requirements from business people's minds into 0s and 1s in the computer systems.
- Master of Science, Computer Information Systems with a Concentration in Artificial Intelligence, 1988.

EXPERTISE: ENTERPRISE ARCHITECTURE + Rules Process Data Integration

- **Enterprise Architecture** - EA, Zachman, ZEAF, BIZRULES Rules Process Data Architecture Framework - Frameworks, models, modeling, and methodology. Taxonomies, ontologies, blueprints, data/rules/process reference models, design patterns, and design for reuse. Design models of terms, concepts, relationships, and attributes. Design and architect the conceptual models, business models, logical models (PIM), and physical models (PSM) of systems, web services, and solutions. Design and engineer the composite models that simplify and describe the integrations between data, rules, process, people, places, organizations, product/organization hierarchies, events, and schedules. My approach is to design architecture models that remove complexity, enable reuse, drive standardization, simplify maintenance, improve quality, reduce risk, and speed up change.
- **Business Process Management:** BPM, BPMS, BPMN - Workflow, Case Management - PegaRULES PRPC.
- **Business Rules Management:** BRMS, BRE, BR - Rule-based systems, rulebases - Red Hat JBoss BRMS, IBM Operational Decision Management (ODM ILOG JRules, CA CleverPath AION, Oracle Business Rules OPA, FICO Blaze Advisor.
- **Decision Management:** DMN, TDM - The Decision Model, Decision Modeling Notation. Sapiens DECISION.
- **Data Management:** DB, DBMS, SQL - Data architecture, governance, designing enterprise-wide taxonomies, semantic ontology and terms glossary, fact models, fact modeling, concept mapping, conceptual data models, logical data models, meta-data, data modeling, designing relations, dimensions, transformations, attributes, tables, database, data warehouse, and data quality rules.

EXPERIENCE SUMMARY

- **Designing Enterprise Rules/Process/Data Integration Strategy for Fortune 500 firms.**
- **Using Zachman Enterprise Architecture Framework (ZEAF) to align systems with business.**
- **E-Business experience:** 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 (Inter-company Transactions, Cross-Border Trx), Billing, AR/AP, Revenue Management, Yield Management, Intellectual Property Management, Cruise Reservations, Commissions, Sales Force Automation, Supply Chain Management, Commercial software for Life Insurance, Financial Planning, Pension, CRM and DECISION.
- **E-Gov experience**: Designing and building Rule-Based Systems for US IRS Individual Income Tax submission processing, and Canada Social Security Benefit Eligibility & Entitlement adjudication. FINRA, KYC, AML rules.
- **Experience designing and building AI Algorithms, Rule Engines, and Intelligent Systems for:** Product Recommendation & Selection, Problem Diagnostics & Equipment Troubleshooting, Customer Service, EH&S Audit, Web Expert Advisors, Condition-Based Maintenance, Lab Test Analysis, Workforce Scheduling Optimization, Tax Minimization.
- Deep content knowledge in advanced AI reasoning technologies KM, ES/BRE, BRM: Knowledge Management, Expert Systems, Business Rule Engines, Business Rules Management, and Decision Management.
- Experience harvesting, modeling, documenting, and writing rules for business executives and SMEs.
- Experience architecting, engineering, modeling, and designing rulebases, rulesets, and rules for BRE/BRMS Rule Engines PegaRULES PRPC, IBM ILOG JRules, Fair Isaac Blaze Advisor, Haley Rules/SoftLaw (pre-Oracle Rules), Corticon, MindBox, Microsoft BRE, CA CleverPath AION, and Gensym G2 ReThink.

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TECHNICAL SUMMARY

- **Business Rules Engine (BRE):** Also familiar with these rule engines that I have reviewed or evaluated during Client RFP Projects, technical analysis, 30-60-day trial-demos: Pegasystems PegaRULES Process Commander, Microsoft BizTalk Server BRE/BRMS, RulesPower Process Logic Modeler, CA CleverPath AION, Fair Isaac Blaze Advisor (Neuron Data NExpert), Gensym G2, Oracle Haley Rules & Haley Authority, Oracle Rules OPA, Exsys, XpertRule, Corticon, InRule, IBM WODM ODM ILOG JRULES.
- **Rulebase design, architecture, and integration.** Forward-chaining (Blaze, AION), and Backward-chaining (NExpert, AION) rules architecture & design. Blaze Rules Application Developer (UI). Design Decision Trees, Decision Tables, Inference Rules (IF/THEN), Scorecard Rules, Constraint Rules.
- **Process Modeling:** Unified Modeling Language (UML), Rational Rose, Rational Unified Process (RUP), Rational RequisitePro, BPMN Business Process Modeling Notation, BRML Business Rule Markup Language, Erwin, Visual Modeler, Visio, Oracle Designer. ERP: ORACLE Financials / GL, AP, AR, PO.
- EA Modeling & Simulation: IBM System Architect (Telelogic/Popkin), NoMagic, CaseWise, and Gensym ReThink.

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 simplify rules, improve processes, and speed up time to market.
- Exceptional ability to quickly learn new industries, business rules, and business processes.

SKILLS

- Proven strategic thinking skills. Driven to build smart 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 and work with 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.

GRADUATE RESEARCH

- Intelligent Computer Systems Research Institute (ICSRI) - 2 years.
- University of Miami School of Business. Research Assistant & Graduate Assistant to Dr. David Bendel Hertz, Distinguished Professor of Artificial Intelligence (Inventor of Monte Carlo methods in finance, and one of the founding fathers of Operations Research and Strategic Risk Analysis / Decision Analysis.)
- Studied knowledge acquisition (KA) methodologies, knowledge representation (KM) techniques, and knowledge modeling (KM) diagramming. Also studied data mining, Bayesian networks, inference, neural networks, directed acyclic graphs (DAG), natural language processing (NLP), and probabilistic reasoning.

HIGH SCHOOL INTERNSHIP / UNDERGRAD RESEARCH INTERNSHIP

- Healthcare/ Medical Informatics / Clinical Information Systems - 4 years.
- Medical Computer Systems Laboratory (MCSL). University of Miami School of Medicine/Jackson Memorial Hospital. Research Assistant to Dr. Jeffrey S. Augenstein, Co-founder and director of the Ryder Trauma Center.
- I started working at MCSL as a high school intern programming VAX/VMS BASIC. I continued working there as a college intern and worked my way up to become INGRES Database Administrator.

GE Energy, GE Capital   Atlanta, GA / Schenectady, NY

Business Process Modeler & Business Rules Architect (BIZRULES)   2002 – 2012

- Designed the Enterprise Business Rules architecture, strategy, and methodology for discovering and documenting business rules for GE's Knowledge Supply Chain project.

- GE licensed my BIZRULES® Methodology and is using it as the standard for eliciting, documenting, managing, and automating business rules. Working with top Tax Executives & Six Sigma Black Belt SMEs to document business rules that aid Corporate Governance, ensure compliance with Sarbanes-Oxley and other laws in 120 countries, and drive tax minimization strategies. (BIZRULES consultant)

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- This program is based on PegaRULES Process Commander technology. Work closely with Pegasystems PRPC Architects, Consultants, and Developers. Meetings with Pega executives/VPs/CEO on our work at GE.

- GE is using my BIZRULES VISION methodology to extract rules from Experts. Also using BIZRULES utilities to extract rules from Source Code and Documentation (rules & procedures manuals, policies & procedure guides, etc.), and to Document/Model business rules.

- Experience with PegaRULES PRPC business rule engine/BPMS includes:
  - Extracting Client's business rules, business processes, and expert knowledge.
  - Documenting Client rules, requirements, and process models so that (1) The Business can easily approve the documentation, and (2) Developers can easily code from the same models.

- My Documentation includes creating Blueprints, Specs, Rulebooks, EA Models, and Engineering Models of:
  - Terms & Definitions Business Glossary, Fact Models, Concept Maps. Mapping PegaRULES BPM terminology to client business terminology.
  - Business Object Models, Data Models; Business Object Hierarchy & Reuse Model.
  - Enterprise Architecture Framework. Worked with John Zachman to create a new "Rules EA Model" that shows Enterprise Rules/Process Integration. John invented the Zachman Enterprise Architecture Framework. We work together on an EA Working Group that meets quarterly.
  - Business Process Models, Workflow Models, Timing/Event Models. Decisioning Models.
  - Rulesets and Rule Models. Deciding whether rules are forward-chaining, backward-chaining, or mixed-mode. Document rules as IF THEN, decision tables, decision trees, rating tables.
  - Interfaces for batch data upload, real-time web services, Document Repository/Scanning.
  - Designing UI models and screen mockups UI wireframe models. Using Pega UI Wizard to customize the UI to look and feel like and follow client Branding Standards. Customizing UI skins to match GE-standards.
  - Event/Timing Model & Dependency/Duration Model. Documents, Reporting/Reports Models
  - User Training Guides; Test Plan Models and Test Scripts. (Pega TMF)
  - Document business requirements, specs, plan for migrating from PRPC v5.3 to 6.3.

- Business Rules Architect on the GE Energy Contractual Modeling System (COSMOS). COSMOS models GE Energy Customized Service Agreements (CSA). Probabilistic models project scheduled maintenance events, unplanned outages, parts repairs, inventory levels, billing, and payment streams throughout the lifecycle of the contract, from Actualization through End of Term (EOT). Helped the GE team harvest and design optimization rules for scheduling planned maintenance and unplanned repairs. Modeled data-based and goal-based rules to determine inventory levels, replenishment method, quantity, and schedule.

IRS PRIME Business Systems Modernization Project   Gaithersburg, MD

IBM Business Rules SME & IBM Key Personnel   2001 – 2002

My Role:
- Helped design the Business Rules architecture, methodology, and strategy for harvesting and programming the 250,000 IRS business rules for Individual Income Tax Return Submission Processing (Form 1040 Series).
- Provided expertise in Business Rules technology, design, and industry best practices on the IBM CADE Team. Also provided expertise in rule harvesting, rule discovery, rule modeling, and rule authoring. Helped IBM design the rule engine portion of IBM's RFP Proposal, which won the bid for the CADE project. Developed the custom business rules methodology used by IBM to interview IRS SME's in order to acquire and document Individual Tax Return business rules. My BIZRULES® Business Rules Methodology was being used as a framework for the custom IRS Business Rules Methodology.
- Key Personnel for IBM on this project. *(BIZRULES subcontract with IBM Global Services)*

Project Overview:
- IRS PRIME is a 15-year $10 billion Business Systems Modernization Project to modernize all Internal Revenue Service applications. Analysts say this is one of the largest civilian systems development projects in the world.
- All 250,000 IRS Business Rules for processing Individual Tax Return submissions will be stored in Business Rule Engines instead of being hard-coded.

Business Goals and Value Added:
- Take the tax agency from a paper-pushing system to an interactive online program for taxpayers. Among the goals are to deliver tax refunds in as little as two days instead of five weeks, enable taxpayers to receive e-mail messages from the IRS about their returns and track the status of refunds online. Enable IRS Tax SME's and Business Analysts (non-programmers) to author /modify business rules without reprogramming or recompiling.

CSX Railroad, Business Rules Architect (BizRules consultant)

- Led RFP project to select CSX's Business Rules Engine for Enterprise Application Development.

Royal Caribbean Cruise Lines (RCCL), Business Analyst   1998 – 2000

- See http://bizrules.com/clients_cruiseline.htm for details. *(BIZRULES consultant)*

Financial Data Planning (SUNGARD Insurance)   Coral Gables, FL

Systems Development Manager   1997 – 1998

- FDP (SunGard Insurance) was a $30 million software developer for Life Insurance, Policy Administration, Financial Planning, Pension, and CRM applications. I was in charge of implementing FDP's strategy to reuse code and integrate five core apps into one suite. Led the team that designed the enterprise DB model. Hired and led the 10-member Vision R&D Team that quickly gained a reputation as the top SW developers and MS VB experts out of 200+ developers in FDP. Led team that created FDP's System Dev. Methodology, developer training program, standards for specs/requirements, programming/deployment, project planning & tracking.

Canada Social Security System Modernization Project   Ottawa, Canada

EDS Business Rules Programmer (BIZRULES contract)   1996 – 1997

- Programmed Disability Eligibility & Entitlement Business Rules on this $400 million project. I was brought in by EDS Canada because of my expertise with the CA AION Rule Engine. As one of the AION expert-system developers, I programmed Eligibility / Entitlement Rulesets, AKA "rule islands." Helped effort to migrate Social Security payroll withholding data and benefit data from legacy mainframe database to DB2 and Oracle. My first Y2K Project. *(BIZRULES subcontract with EDS Canada)*

Business Goals and Value Added: System delivers $30 billion in 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/year or $703 Million/15years.

Burger King (World Headquarters)   Miami, FL

Project Manager   Dec. 1994 - 1996

- Led development of BK's Balanced Scorecard System/Sales Force Automation System, The RoadRunner EIS, which helped six Regional VPs and 400 field Managers track Sales and A/R for 6,000 Burger King restaurants nationwide. Monitored concurrent development of five systems by an offshore. Responsible for planning, proposal writing, contract negotiations, client acceptance testing, training, & implementation. Reported to Director of MIS. See http://bizrules.com/clients_BurgerKing.htm. *(BIZRULES consultant)*

Pepsi-Cola Buenos Aires Embotelladora (BAESA)   Boca Raton, FL

Senior Project Manager   Jun. 1994 – Dec. 1994

- Reporting directly to the CIO, I managed implementation of BAESA's Pepsi System 2000 Sales and Distribution System (S&D) in Brazil and Puerto Rico. PS2000 was a $300 million system built by Pepsi-Cola for their Latin American bottlers' Supply Chain Management system. BAESA was Pepsi's largest bottler outside the USA.

Mobil Oil Corporation (World Headquarters)   Fairfax, VA

Project Manager, Senior Programmer Analyst   Jun. 1988 – Jun 1994

- During six years at Mobil Oil, I established Mobil's Global Expert System Strategy, implemented their global Knowledge Management Strategy, and was lead programmer of Mobil's first successful Executive Information System for Int'l Marketing Division executives.

- Designed and built intelligent systems for predicting equipment faults (diagnostics) and recommending preventive maintenance (prognostics) for compressor lubrication, hydraulics, rolling mills, cutting oils, and marine (cruise ship) diesel engine lubrication. Modeled and programmed equipment problem diagnosis business rules that provide expert advice on troubleshooting and problem resolution. Also modeled and documented predictive analytics rules that predict failures (bearings, gears) and recommend preventive maintenance.

- Led Knowledge Acquisition Teams that interviewed Mobil's top experts in EH&S Safety, Oil Fire-Fighting, Oil Spill Cleanup, Compressor Oils, Synthetic Lubricants, Greases, Rolling Oils, Diesel Engine Lubrication, Marine & Aviation Oils, Product Recommenders, and Equipment Troubleshooters. Developed EHS Risk Mgmt. System.