

William Montes-Pack

Former Board Member of the International Association of Business Communicators ([IABC/SF](#))



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Specializing in crisis management, management consulting, IT consulting & project management

OVERVIEW OF TECHNICAL EXPERIENCE

- **Platform:** Windows XP Advanced Server, Windows 7/Vista/XP Pro/Mobile clients
- **Software:** MS-Office Pro 2010, Exchange Server, Visio, MS-Project, SMS: Remote Control and Package Commander, DPU 4.0 with SQL 4.0, eXceed, Extra! 3270 emulator, Remedy, Lotus Notes 5.0 and SmartSuite Millennium 9.1, ABT: Project Workbench Labor Tracking System; Oracle 7.3.4.0, Sapiient TAR Trackers, Vantive, FileNET SAROS

BUSINESS MODELS

- **The Balanced Scorecard:** Internal processes, financial performance, customer & employee satisfaction
- **Andersen Consulting Technical Support Model:** MODE: Management of Distributed Environments (multiple-tier support model) serving end-user community of 2000 technical specialists
- **IBM Models:** Customer Relationship Management (CRM) Process Model: Opportunity Management and Solution Design and Delivery; World Wide Solution and Delivery Management (WSSDM) Model: project management method
- **Project Management Methodologies:** Andersen Consulting, IBM Global Services: World Wide Solution and Delivery Management (WSSDM), Norwest Corp. Corporate Project Methodology (CPM), Project Management Institute (PMI)

PROFESSIONAL EXPERIENCE

Management, Legal & Financial Consultant & Legislative Analyst

California Indian Environmental Alliance

02/07 - Present

- Legislative analysis
 - Review all state & federal mercury & water-related legislation, bills & bonds as well as regulatory issues
 - Write responses to Federal & State legislators and regulators regarding potential legislation and rules
 - Assessing impact of water activities on CA tribes
 - Posting all legislative & regulatory updates on the www.cieaweb.org blog
 - Representing CIEA at scientific, legislative, agency (state EPA) & peer conferences and working with State Capital staff
 - Developing lobbying training workshop to teach CA tribes to lobby on their own behalf
- Management and financial consulting
 - Capacity building: planning IT systems & management processes for expansion of organization geographically, increased services, additional constituents & staffing levels
 - Performance system & process implementation (Balanced Scorecard)
 - Vertical status & reporting process implementation

- Wrote 2010 Business & Financial Plan for grantor & entity requirements
- 501(c)(3)entity and legal(government)requirements & compliance
- IT Systems consulting (acting IT Director)
 - Wrote yearly IT Plan
 - Asset acquisition
 - Project management
 - Implementation of Exchange Server 2003
 - Implementation of Joomla web database with document repository
 - Backup procedures, file server structure
- Grant research & proposal writing for general admin & IT needs
- Marketing and development coordination

Owner / Treasurer / Manager

Benicia Realty Management, Inc.

02/07 - Present

- **Chief Operating Officer**
- Business planning, development, entity requirements
 - Legal, state & federal entity compliance
 - Wrote integrated 2008 Business Plan with Financial Plan
 - Sought funding and venture capital
- Financial analysis, bookkeeping / payroll
- Corporate taxes, payroll taxes, FTB & IRS trouble-shooting
- Marketing

Thomas Jefferson School of Law - Continued Education

Completed 1L & 2L years, 2004-2006

- Contracts I & II
- Torts I & II
- Wills, Estates & Trusts
- Legal Analysis & Writing
- Constitutional Law
- Corporations I & II

Volunteer: Systems Consultant

International Indian Treaty Council

07/03 - 12/03

- Asset cataloging
 - Servers, 12 Clients
 - All software
 - Contract & license review for compliance

Management Consultant

Licensed to Code, San Francisco

01/03 - 05/03

- Quickbooks consulting
- A/R, A/P Client Accounts setup
- Reconciliation procedures
- Server with 2 clients
- Intuit business partner
- Parallel bookkeeping to reconcile Quickbooks with manual system

Senior Management Consultant

Senior Project Manager

Artizen, Inc. at Cisco Systems, Inc.

Enterprise Architecture (EA) Program Management Office

01/02 - 05/02

- Developed EA Charter: Vision and Principles aligned with Executive level MBO's; Assist in developing Sponsorship Plan
- Developed and implemented consolidated Enterprise Architecture implementation project plan for Program Office and EA functional tracks (Infrastructure, Data, Integration and Application Tracks)
- EA Communication Lead: Developed and implemented EA Strategic Communication Plan, tactical communication plan and led all communication efforts, EA Track Communication Lead.
- Defined and implemented program level performance metrics and scorecard (EA Performance Management System) based on the Balanced Scorecard
- Facilitated design and implementation of EA Best Practices repository
- Assisted in development of the Cisco Global IT Portfolio Management model
- Research industry standards in EA governance, EA implementation, EA metrics and EA best practices using Gartner and METAGroup
- Project management: tracked PMO tasks, developed executive status reports, presentations to senior staff, project planning, etc.
- Assisted project managers in learning organizational communication skills such as focus groups, interpersonal and inter-team communications, standard project documentation (following PMI best practices) and project planning

Senior Project Manager / Management Methodology Consultant

Strategy and Information Technology

Chela Financial Resources, Inc.

12/00 - 09/01

- Designed and implemented proprietary project management methodology including product development lifecycle, software development lifecycle and change management. Planned and implemented Microsoft Project 2000 deployment to Chela managers
- Managed multiple projects from requirements to implementation. Including, CRM database on Oracle 8i, customer website for loan applications, online credit decisioning, ePartner Program (a marketing program). Used standard PMI software development lifecycle
- Implemented testing cycles including code walk-through, unit, integration and user acceptance testing, based on industry best practices
- Project mentoring for Chela managers
- Implemented standardized communications processes including vertical status reporting and documentation standards (contracts, service level agreements, statements of work, estimate documentation and budget analyses)
- Managed team of 2 project managers/business analysts, 1 web developer and 1 senior engineer
- Defined and implemented operations management methods
- Internal and external systems integration
- Process and systems mapping using Visio 2000
- Executive presentations for systems concept, leadership buy-in and project kick-offs
- Student loan industry, marketing and IT systems and project management research
- Vendor management from project bidding to service level agreement to contract signing
- Legal research including Federal lending and credit requirements, online security requirements and contracts

Technical Manager

Maxim Group at Wells Fargo Services Corporation

"You Owe Me" Development and Technical Support Team (collections system)

WFSC Retail Technology Services Group

04/00 - 12/00

- PowerBuilder front-end on Win95, Oracle database back-end on UNIX, LAN on NetWare 5.1
- Operations & project management

- IT Planning, strategy, cost / benefit analysis, business cases and implementation
- Managed software development lifecycle
- Managed database development, operations and maintenance
- Multiple project management including: data conversion projects, systems integration & product integration
- Requirements review, project scope, cost analysis and estimations
- Change management: software bug fixes, enhancement request management and process changes
- Application release management: communications, cross-organizational coordination, status reporting
- Technical support management
- Matrixed task delegation
- Managed 4 developers, 3 programmers, 4 database administrators
- Service Level Agreement negotiation and documents of understanding writing
- Operations: day operations, production, night operations, maintenance coordination
- Crisis management and escalation process & developed business continuity plan
- Customer/leadership relationship management, business - technology liaison, product champion
- System and team status reporting and project milestone roll-ups
- Designed business model for Collections Solutions Engineering Center transitioning YOM out of crisis

Project Manager / IT Management Consultant

IBM Global Services - Healthcare Industry

International Business Machines, 425 Market Street, San Francisco CA

04/99 - 11/99

- Trained in IBM software development lifecycle management (WSSDM) - IBM Global Services Institute: Applying Skills in a Project Environment and Customer
- Relationship Management and Opportunity Management
- Research in technical industry best practices, benchmarking, measuring customer satisfaction and process methodology
- Communication Management
- IBM-Kaiser Permanent project server setup: NT 4.0 Advanced Server, RAS, Lotus Domino, User Admin, etc.

Financial Manager

IBM Global Services - Healthcare Industry

National Clinical Information System project - IBM's largest software and systems development project

IBM NCIS Program Office Financial Manager at Kaiser Permanente, Oakland

04/98 - 04/99

- Analysts International Corporation, Concord CA
- Customer Relationship Management: IBM and Kaiser Permanent financial liaison
- Financial Manager for IBM's largest software development contract, totaling \$ 50 million
- Contract development and adherence
- Designed project financial model
- Forecasting, budgeting and staff management
- Above industry standards in accounting and billing accuracy
- Expense and labor authorization
- High-level Excel formula programming
- Implemented Client billing using Client's labor tracking system and Electronic Debit System (EDS) as value added financial service
- Designed and implemented project financial metrics and trend analysis
- Implemented continuous improvement processes and quality initiatives
- Coordinated labor and expense billing efforts with IBM internal organizations

- Designed & prepared monthly billing summaries and financial reports
- Adjustment tracking and reconciliation up to \$ 5 million on a monthly basis
- Developed and implemented labor and expense reporting processes to lower project costs

Project Manager

Transition Lead/Communication Manager (IT/Business Liaison)

Computer Resources Group at Pacific Bell, San Ramon CA

Technical Support Team (TST) - Customer Care and Billing Technology (CCBT)

TST is the winner of the 1997 Pacific Bell Quality Process Award

01/97 - 10/97

1. Developed and presented business case for creation of Communication Manager position.
2. Developed vision of Communication Manager position and set direction for TST communication efforts based on industry best practices. Provided effective communication perspective for business decisions.
3. Centralized and established ownership of all communication activities, policies and processes.
 - Developed and maintained, high-level work-plan for all communication activities.
 - Crisis management: single point of contact for user-group and high-level technical issues.
 - Team Lead for Adopt-A-Director Program: a continuous improvement program providing director input and escalation points for all new TST processes and policies. Developed vision, implemented plan, recruited and supervised facilitators.
 - Transition Lead: planned for transition of TST services to Pacific-Bell-wide support model using the TST Strategic Communication Plan following the standards and models provided by the International Association of Business Communicators.
 - Outlined approval and release processes of end-user districts to IBM-ISSC and metrics methodology to track success.
 - Project Manager: for TST Web Site. Needs analysis, functional design, high-level work plan and supervised development.
 - Training: approval of all Level I to III technical and end-user training through various media.
 - Communication policy: developed policy, presented business cases, wrote, implemented and maintained TST Communication Plan and TST Strategic Transition Communication Plan. Approved broadcast communications, presentations and end-user documentation.
 - Conflict resolution measures, communication platform usage, outage resolution policies and documentation processes outlined in the Plans. Public relations, customer service and TST internal communication policies provided by the Plans.
 - Technical documentation: developed and implemented documentation management processes, cost/benefit analysis of SAROS v. LAN documentation processes.
 - Migration of FileNET SAROS knowledge management system data during transition
 - Approved technical writing of end-user and technical job-aids; researched, and supervised updating of TST documentation for release to end-users, Level I - III Technicians, CCBT directors and the new support organization prior to transition.
 - Technical writing: Netscape rollout, NT migration, Exchange rollout, and Atria Clear Case roll-out job-aids.
 - Staff management: Hire/Fire to maintain 60/1 end-user to technician ratio.
 - Metrics: developed, implemented and supervised end-user and director satisfaction metrics: benchmarking (Gartner Group reports), survey design, distribution, response compilation on a weekly basis and recommended and implemented process improvements.
 - Process management: identified needs, designed process improvements using Visio, presented business cases to TST leads and CCBT directors and oversaw implementation. E.g. Outage Resolution and Reporting Process.
 - Mentor: provided communication models and philosophy to new Communication Manager following my project completion.
 - Identified and implemented policy for all non-standard applications that conflict with technical environment.

- Effective teaming events: coordinated effective teaming seminars with Telesis Management Institute using [Myers-Briggs Type Indicator](#) - a psychological performance review tool. Maintained coaching environment via informal feedback, recognition and assistance in meeting deliverables.
- Vendor relations: ENTEX, IBM and XEROX

Level II Technician

Computer Resources Group at Pacific Bell, San Ramon CA

Technical Support Team (TST) - Customer Care and Billing Technology (CCBT)

01/96 - 12/96

- NT migration planning and implementation from WFW 3.11 for 250 laptops and desktop computers
- Laptop deployment including user training, and hardware and software installation.
- Addressed PC architecture concerns: memory configuration, device drivers for laptops, modems, monitors, multimedia devices and optical scanners
- Maintained LAN, WAN and RAS connectivity for all end-users
- TCP/IP, Dial-up networking and RAS configuration
- NT 3.5 through NT 4.0, Win95, 3.11 installation and configuration
- DP Umbrella 2.0 ticket management software with SQL Reporting System
- Provided award-winning quality desktop, hardware and software support services
- Tested group core components with TST standards. Integrated applications within the NT platform
- Level III security contact for LAN access and password administration
- Atria Clear Case, PVCS, Remedy installation and configuration. Assisted in groupware rollout
- ODBC configuration for Oracle, SQL and MS-Access
- Office 97, Exchange 5.0, IE 4.0, Outlook configuration and support
- Resolved calls within documented guidelines
- Assisted trouble calls from end-users to the Vice President of CCBT
- Assigned and resolved trouble tickets recorded resolution within 1 to 3 hours (above industry standards)
- Facilitator for Adopt-A-Director program
- Follow up with clients to ensure satisfactory resolution; escalation contact for conflict resolution
- Developed and presented training materials and process documentation for end-users, directors and technicians for software support and rollouts

SMALL BUSINESS EXPERIENCE

Temporary MIS

March of Dimes

09/95 - 12/95

- Novel 1 NetWare 3.11 server support. Systems analysis, hardware and software purchasing, budgeting. Hardware donations planning. Database administration and report writing. Technical support for 25 end-users.

Operations Manager / Systems Consultant

Benicia Realty Management

06/85 - 09/95

- RPM-1000 installation and support. Workflow integration, analysis, design and implementation. Trust Account, A/R, A/P, payroll, tax reporting. Established relationships with owners, tenants, vendors and lenders and other customers.

Accounting Consultant

One Step Apparel

06/95 - 08/95

- QuickBooks Pro installation, configuration and training. Workflow design and implementation.

Systems Consultant

Association for Retarded Citizens

01/95 - 02/95

- Workstation requirements, purchasing, configuration and implementation. Training and support.

EDUCATION

Thomas Jefferson School of Law

Completed 1L & 2L years, 2004-2006

San Francisco State University

BA, Speech and Communications, 1995

- Projects Teaching Speech
- Legal Research Methodology
- Organizational Speech
- Conflict Resolution
- Community Service Writing
- Argumentation and Advocacy
- Argumentation and Debate
- Forensics Team: CEDA Debate Circuit

Sonoma State University

Management Major, 1990-1992

- Computer Applications in Management
- The Legal Environment of Business
- Human Resources Club
- DJ at KSUN - College Radio
- Micro and Macro Economics

References and Comprehensive Portfolio Available for Review