



Statement of Qualifications

Management Consulting

Bardsley Associates Inc.

2016

Bardsley Associates Inc.
Statement of Qualifications

Table of Contents

1 BACKGROUND AND EXPERIENCE3

2 QUALIFICATIONS – BUSINESS PROCESS IMPROVEMENT5

3 QUALIFICATIONS – IT STRATEGIC PLANNING AND IT GOVERNANCE6

4 QUALIFICATIONS – TECHNOLOGY SELECTION8

5 QUALIFICATIONS – IT PROJECT MANAGEMENT10

6 QUALIFICATIONS – INDEPENDENT PROJECT ASSESSMENT12

7 QUALIFICATIONS – IT PERFORMANCE, STAFFING AND ORGANIZATION13

8 QUALIFICATIONS – SYSTEM DESIGN SERVICES.....15

9 CONSULTANT QUALIFICATIONS16

10 CONSULTANT RESUMES17

11 CONTACT INFORMATION.....24

1 Background and Experience

1.1 OVERVIEW

Bardsley Associates was founded in 1987. We understand that business systems are complex. In order to mitigate the risks associated with that complexity, clients need an independent expert who can examine the situation from every angle. Our approach takes into consideration not only the technology issues, but also the people, policies, regulations, finances, workflow and organizational issues that can be critical to an IT project's success.

1.2 OVERVIEW OF CONSULTING SERVICES

Bardsley Associates provides consulting services in the following areas:

- **Project management and implementation:** Our projects have a high success rate because of our realistic approach to project management. We manage all the variables involved, not just timelines and budgets.
- **Business process improvement and redesign:** Organizations may decide to redesign business processes for many reasons. Most frequently it is in order to optimize the benefits from new technologies. Other times it is to streamline existing processes to reduce waste, or to improve quality and customer service.
- **Change management:** We take a holistic approach to organizational change management, including organizational communication, training, support, employee surveys, and advising executive leadership.
- **Instructional design:** We can manage all aspects of instructional design, from problem analysis, training needs assessment, instructional content design, delivery methods, assessment, and evaluation.
- **IT strategy development:** You have a business strategy; does your IT strategy support it? Bardsley Associates helps you create a plan for using IT to achieve your business goals.
- **Technology selection:** Because we are vendor neutral, we serve as your advocate, helping you consider all the issues involved in selecting the system that is right for you. We have no business relationships with any hardware or software vendors. We do not promote, sell, or resell any products so we can provide unbiased assistance during the selection process. To keep up-to-date on the marketplace, we stay in regular contact with all the leading software vendors.
- **Independent project assessment:** Do you have a project that is at risk? Over budget? Past its due date? Not meeting expectations? We can provide an independent assessment and help you evaluate your options.
- **IT governance:** How are your IT systems decisions made? How are your projects prioritized to support your business objectives? What kind of metrics, oversight and accountability do you have in place to ensure you are maximizing your IT investments?

- **IT performance, staffing and organization:** How well is your IT department performing and which metrics are being used to measure performance? Is your IT department providing the services that are most valued by the business? Is your IT department organized to meet the needs of the organization? Do you have the right people in the right jobs, and do they have the right training and experience?

Because we are senior project leaders we provide much more than traditional project management. For instance we can also:

- **Anticipate:** 20 plus years of experience has given us the insight to anticipate the variables that affect a software implementation. This will enable us to address issues before they become serious problems.
- **Facilitate:** We know that business process changes will be required in order to gain value from the new system. We are skilled change agents that can work with people to take the emotion out of the discussion. We do this by helping the staff define the business requirements and then objectively evaluate alternatives that result in decisions that can be embraced by those affected.
- **Educate:** Client staff will be assigned many tasks that it doesn't have experience performing. We are able to educate the team members and provide them with tools that will help them be successful. For example, we can teach them how to map data for conversion or how to write test scripts.
- **Advocate:** We are the client advocate, as always, when working with the vendor. We will work with the vendor to make sure that it places the needs of the client as one of its top priorities.
- **Acclimate:** We are comfortable working in dynamic environments where priorities change rapidly and can adapt project plans to meet the needs of the client.

1.3 OUR STRATEGY AND APPROACH

Bardsley Associates has been in business since 1987. Our corporate strategy has been to remain independent of technology solutions in order to provide objective advice to our clients. Our organizational strategy is to have a small number of experienced senior-level consultants so we are not "training on the job". Our goal is to have 100% satisfied and referenceable clients.

Bardsley Associates consists of two principal consultants: Jackie Bardsley and John Blanchard. Jackie Bardsley is the president, founder, and owner of the firm.

2 Qualifications – Business Process Improvement

2.1 METHODOLOGY AND APPROACH

Bardsley Associates consultants are skilled in business process improvement and redesign and we understand how important it is to change legacy business processes to gain maximum benefits from new technologies. We also understand how difficult it is for organizations to change. This is why we take a collaborative approach to business process changes. First we help our clients map existing process, which often highlights areas that need obvious improvement. Then we work with our client to evaluate the alternatives and gain the mindshare and buy-in that are required for successful process improvement.

We have performed complex process redesign projects in many organizations. Our mix of private, public and non-profit sectors clients allows us to evaluate the best practices from each industry. We often perform process re-design during technology implementations as the new system provides a catalyst for change. Often our clients prefer to change their business processes rather than modify commercial software to support their existing practices. The project deliverables usually include process flow diagrams, decision matrices, and elapsed time, quality measures and hand-off analysis.

2.2 EXAMPLE PROJECTS

Some of the business process improvement projects we've led include:

- New customer account creation.
- Customer setup, credit management and order expediting.
- Cash application for high volume remittance processing.
- Quote to cash processes.
- Purchasing and accounts payable processing.
- Recruiting and staffing.
- Staff scheduling and timekeeping.
- Employee performance appraisal.
- Cash application processes for utility billing.
- Utility billing closing and final bills.
- Utility billing on-line credit card payment.
- Permit processing.

We've also managed significant training efforts including the design and management of the system and process training for a large city government and a major health care organization, both involving several thousand users.

3 Qualifications – IT Strategic Planning and IT Governance

3.1 METHODOLOGY AND APPROACH

We have a flexible approach to our projects, allowing us to match the unique needs and style of our clients. For the development of an effective IT Strategic Plan, the active involvement of the client's executive team is mandatory. Our recommended approach includes the following steps.

- Confirm that the organization has a documented business strategy that is up-to-date and is both understood and supported by the company's executives and management team.
- Review the business strategy, marketing plans, organization charts, incentive compensation plans, and other background documents. In some cases, it is necessary to develop a more detailed business plan in order to answer the questions that are necessary to plan an appropriate approach to technology.
- Define the scope of the IT strategic plan and develop a high-level project timeframe and work plan.
- Interview management to understand the goals, priorities and objectives of the organization.
- Review and assess the effectiveness of existing systems.
- Perform research and analysis to support required project scope. This could include competitive analysis, technology research, industry research, additional interviews, etc.
- Evaluate the existing leadership, management, staff and organizational structure and make recommendations as needed to support the organization's objectives and strategies.
- Identify opportunities for improvements.
- Define major alternatives for technology strategy (systems, staffing, budget, etc.).
- Evaluate advantages and disadvantages of alternatives and select preferred strategy and plans.
- Document and communicate recommendations.
- Develop a road map for the future.

3.2 EXAMPLE PROJECTS

Some of the strategic planning projects we've led include:

- Performed strategic IT assessment of current application portfolio for the research organization of local biotechnology company.
- Performed strategic IT assessments of current application portfolios for local high tech organizations.

- Created Strategic IT Plan for document and knowledge management systems for an international not-for-profit organization.
- Developed IT strategy for a private university.
- Developed information technology resource planning roadmap for electronics manufacturer.
- Developed IT governance plan for a large national law firm.
- Develop IT strategy for a major public university and billion-dollar research institution.
- Developed IT governance and decision making procedures for a major public university.
- Developed Strategic IT Plan and 6 year Capital Improvement Plan for local city government.
- Developed strategic financial systems plan for large local county government.
- Performed IT organizational assessments for clients in a variety of industries.
- Prepared Strategic IT Plan and application portfolio for medical systems manufacturer.
- Provided services as acting Chief Information Officer for local wireless telecommunications provider.

4 Qualifications – Technology Selection

4.1 METHODOLOGY AND APPROACH

We have developed an effective methodology for managing projects, gathering requirements, developing Requests for Proposal and documenting the system selection process. We have created an extensive library of checklists and templates which allow us to conduct system selection projects in an efficient manner, focusing our effort on your unique requirements and selection criteria. Our methodology library includes:

- Requirement checklists for a wide array of functionality, including Accounting Applications, Customer Service and Support, Sales and Marketing, Payroll and Human Resources, Manufacturing, Work Orders, Inventory Management, Cost Accounting, Asset Management, Purchasing, Labor Distribution, Document Management, Work Flow, Reporting, Technology, etc.
- RFP templates
- Vendor listings
- Vendor proposal evaluation criteria and score sheets
- Demonstration script samples, reference, due diligence and site visit checklists
- Contract negotiation checklists
- Risk assessment and mitigation
- Sample implementation work plans

We start our all our projects by meeting with project sponsors and key team members to clarify the organization’s goals and expectations relating to the project. The scope and objectives are documented in the project plan for team validation and approval. Next we meet with users and managers to get an understanding of current systems and processes. Where possible, we observe business processes in action, watching staff perform actual business functions in their normal workplace and asking questions to clarify our understanding.

We then develop and clarify business and technical requirements for the new systems. The requirements are documented in a format that can be used directly in a demonstration script and an RFP, to avoid duplication of effort. The requirements and the RFP questions are also reusable as a proposal evaluation score sheet.

Selected software vendors are asked to conduct their demonstrations using a pre-defined agenda and demonstration script. This allows the team members to evaluate the demonstrations on a comparable basis. We spend time to orient all demonstration participants in the demonstration process and to define roles and expectations. We also work with the finalist vendors to help make the demonstration process as effective as possible.

Over many years of managing system requirements and software selection projects, we have an appreciation for the uniqueness of each project and each environment. While we use our methodologies and experience to make the process as efficient as possible, we never attempt to use a “cookie cutter” solution. There are many software solutions on the market and most of them work very well in the right environment. We believe it is very important, not only that an organization selects a solution that will work well for them, but also that all key constituents understand why that solution was selected.

4.2 EXAMPLE PROJECTS

We’ve led hundreds of these requirements development and system selection projects. Some examples include:

- Selection of Enterprise Resource Planning systems for high-tech manufacturing organizations.
- Selection of a payroll/HR and recruiting solution for a biotechnology firm.
- Selection of back-end order management and fulfillment systems for on-line retailers.
- Selection of Customer Relationship Management solutions for high technology and sales organizations.
- Selection of eCommerce, auction and partner relationship management systems for technology companies
- Selection of a Professional Services Automation system for a tech service provider.
- Selection of a financial and manufacturing system for a company in the aviation industry.
- Evaluation of marketing automation solutions for an e-marketing firm.
- Selection of a direct-to-store distribution system and mobile computers for a wholesale dairy distributor.
- Selection and implementation of accounting, HR, payroll, and customer information systems for local government clients.
- Selection of a financial systems vendor for a biotechnology firm.
- Selection of an Enterprise Resource Planning system for a telecommunications equipment manufacturer.
- Development of functional and technical requirements for customer billing system for wireless communications services provider.
- Selection of customer care and billing system for a wireless carrier.

5 Qualifications – IT Project Management

5.1 METHODOLOGY AND APPROACH

Bardsley Associates' project management practice is focused on enterprise IT and project leadership of high risk, high value projects. Over the 25 plus years we have been in business we have developed an effective methodology for managing projects. Our hands-on experience in business process improvement and our subject matter expertise adds great value to our traditional project management. Bardsley Associates can provide full client project management services, or we can share project management responsibilities with the client.

Our project management services include:

- Develop the detailed project plan, including the work plan, staffing plans, budget, statement of scope and objectives, risk assessment, etc.
- Coordinate and schedule all internal resources (team members, users, training facilities, etc.).
- Manage the project scope.
- Manage and report the project schedule.
- Manage and report the project budget.
- Manage and report the project risks.
- Track and report all project issues. Expedite timely resolution of issues.
- Communicate the project status to all constituents; including management, staff, board members, and other interested parties.
- Document key project decisions and minutes of key meetings with the vendors, managers and project team members.
- Manage the vendor contracts (software license agreement, software implementation services agreement, software maintenance agreement, hardware and network support vendor contracts).

5.2 EXAMPLE PROJECTS

Some of the significant projects on which we have provided project management services include:

- Managed implementation of tier 1 Enterprise Resource Planning and financial systems for high technology and biotechnology firms.
- Managed implementation of Customer Relationship Management systems for high technology and manufacturing organizations.
- Managed tier 1 Enterprise Resource Planning system implementation including an interface to a warehouse management system for a 2,000 employee wholesaler.

- Managed implementation of a global employee expense tracking system for a biotechnology company.
- Managed an inventory item renumbering project that involved thousands of inventory items and integration between the engineering design system and the ERP inventory and bill of material systems.
- Managed implementation of customer care and billing system for a wireless carrier.
- Managed an enterprise system implementation for a local city government. The system included all accounting, budgeting, human resources, payroll, and customer information system (i.e. utility billing) modules.
- Managed a customer information system upgrade and cross departmental process improvement project for a local city government.

6 Qualifications – Independent Project Assessment

6.1 METHODOLOGY AND APPROACH

We perform independent project assessments of complex and high risk projects. The objective of these assessments is usually to advise executive management on whether a troubled or risky project should continue or not. We evaluate all aspects of the project – scope, change management, project control, timelines, project management and staffing, project governance and decision-making, issue resolution, budget, functionality, technology, support and vendor performance. We provide specific recommendations for restructuring projects where appropriate. We can also provide ongoing project quality assurance and oversight services to ensure that projects stay on track.

6.2 EXAMPLE PROJECTS

Examples of projects for which we have provided project assessment services include:

- Performed an assessment of a project that was 2 years late and significantly over budget for a major hospital group. Helped restructure the project into phases to lower the risk, revise the executive support structure and implement improved project control procedures. The project was re-approved with a new timeline and completed.
- Performed an assessment of a mission critical project that was 2 years past due and at 300% of budget for a financial services company. Advised executive management on a complete project restructure, revised the work plan and budget and helped recruit and hire a new project manager. The project met the revised timelines.
- Performed an assessment of an e-commerce system project for a software company. Assessed options for continuing custom development, implementing commercial software and other alternatives.
- Provided quality assurance and oversight services for the development and implementation of a research effort certification system at the University of Washington, reporting to UW executive management and the Washington State Department of Information Services.
- Provided quality assurance services for Washington State implementation of a new HR/Payroll system managed by SAP and Accenture, reporting to the State Information Services Board.
- Provided quality assurance and oversight services for implementation of an human resources management, timekeeping, and scheduling system by the UW Medical Center and Harborview hospital, reporting to the Washington State Information Services Board and the UW Medicine executive team.

7 Qualifications – IT Performance, Staffing and Organization

7.1 METHODOLOGY AND APPROACH

We approach IT staffing and organization design projects by addressing the following key questions with the executive team and IT leadership:

- What problems are we trying to solve? We start by getting agreement on the problems by talking to IT managers and IT's major customers/users/stakeholders. There are many different ways we can approach this depending on the sensitivity of the issues and how comfortable everyone is talking about the problems in a group setting. This can be as open as a group brainstorming session, or as confidential as a survey or one-on-one interviews.
- How well is the IT department performing?
- Are we doing the right things in IT and are we doing them well? Examples:
 - What services are provided? How are these services valued by our customers?
 - Are we spending our time where it is providing the most value?
 - How much are we spending on IT and what are we trying to achieve? Are we spending too much or too little?
 - What is the process for making decisions about project and service priorities (governance, portfolio planning)?
 - How effective are our processes for project planning, analysis, feasibility, cost-benefit assessments on projects, and how projects are approved (project intake process)?
 - Are our systems appropriate for our business needs? Where are they overly complex, over-engineered? Where are they under-serving the business needs?
 - How does the supply-and-demand function work with regard to IT services? How does the cost-justified business demand for IT services translate into supply or reallocation of resources?
- Do we have the right people doing the work, and are we organized to support them?
 - What is the appropriate balance of central vs. local resources? What are the pros and cons in terms of efficiency, quality and customer satisfaction?
 - Are there any opportunities for consolidated or shared services to improve quality and efficiency?
 - Are staff adequately trained, experienced and supported in doing the jobs they are asked to do?
 - Do we have the appropriate supervisory structure (managers, leads, etc.) for the kind of work we are doing? Are the roles of managers and leads clearly defined so they are adding value?

- Is there anything we are currently doing in house that would be better outsourced, or vice versa?
- Can we measure and communicate what we're doing? This might include:
 - Performance metrics
 - Benchmarking or balanced scorecards
 - Service level agreements
 - Customer satisfaction surveys
 - Cost allocation and cost recharge methods
 - News updates on plans and benefits achieved

Additional services include development of IT job descriptions, skills and competency surveys and assessments, development of IT staff training and development plans, and assistance in interviewing CIO and senior IT management.

7.2 EXAMPLE PROJECTS

IT staffing and organization design services have been provided for many organizations in the financial services, manufacturing, biotechnology, high technology and professional services industries in addition to public sector, non profit and higher education institutions.

8 Qualifications – System Design Services

8.1 METHODOLOGY AND APPROACH

Our design services are focused in the following critical areas:

- Project management
- Cost-benefit assessment and scope management
- Requirements definition
- Development of detailed functional and technical specifications for the system, including logical data models, UI design, business rules, work flow and reporting
- Coordination with software developers throughout the programming phase
- Development of test plans to support the quality assurance efforts
- Development of user training plans
- Development of on-line help and user documentation
- Development of data conversion and interface specifications
- Development of ongoing system support and maintenance plans

Bardsley Associates consultants are experienced in leading methodologies and development processes, including Agile, LEAN, SCRUM, user cases, and traditional methodologies.

8.2 EXAMPLE PROJECTS

System design projects that we have led include:

- Development of business requirements and functional specification for a global career site for a Fortune 500 high technology company.
- Design, development and implementation of an expert product configurator for a manufacturer of telecommunications equipment.
- Design and implementation of customer billing data warehouse.
- Design, development and implementation of an electronic notification system and Web access to customer data.
- Design and development of an on-demand staffing system for medical staff.
- Design and development of an online auction and e-commerce Web site for a company selling home products and apparel.
- Design and development of storage, transportation, scheduling, delivery and pickup system for a company in the off-site media storage business.
- Design of an industry portal and e-commerce Web site for the wood products industry.
- Design of a purchasing, accounts payable, vendor management, contract management, workflow and document management system for a County government.

9 Consultant Qualifications

The consultants at Bardsley Associates bring a special combination of skills to the table, along with years of experience, backed with Bardsley Associates' set of proven methodologies.

Bardsley Associates has strong experience in project planning, project management, and business analysis. We collaborate with our clients to develop plans that accommodate the realities of often limited resources, tight timelines and constraints around year-end financial reporting. This helps us get buy-in from team members and the steering committee which in turn helps everyone keep their project commitments.

Jackie Bardsley is a Certified Management Consultant with over 40 years of business and information systems consulting experience. Jackie specializes in project management, change management, requirements analysis, system selection, business process improvement, strategic IT planning, instructional design, and system design.

Jackie's clients include: Active Voice Corporation, Adobe Systems, Avidian, Casey Family Programs, City of Mountlake Terrace, Consolidated Metco, Corbis, Data Base Inc., Gargoyles Eyewear, Gonzaga University, ICOS, InServe Corporation, Keystroke.com, Lakewood Water District, Microsoft, Nastech, Onvia, Optimum Energy, PATH, Pierce County, Pierce County Utilities, Plexus/SeaMED, the Port of Seattle, Print Management, Puget Sound Blood Center, Sierra Online, Sparling, Two Degrees, the University of Washington, Vigilos, WorldCatch.com, World Wide Wood, World2Market.com, WRQ, the YMCA of Greater Seattle, and ZymoGenetics.

Prior to founding Bardsley Associates in 1987, Jackie was a management consultant with Price Waterhouse for 11 years and was Financial Systems Manager for Westin Hotels for 3 years.

John Blanchard has over 25 years of experience in information systems and technology. John joined Bardsley Associates as a management consultant in 1994 and specializes in system selection, strategic systems planning, business process improvement, systems design, software development and systems implementation.

John's clients include Active Voice, Acucela, Alaska Airlines, ICOS, Korry Electronics, Microsoft, Pierce County, Port of Seattle, PATH, Primus, Plexus/SeaMED, Sierra On-Line, Toll Free Cellular, Traveling Software, WRQ and Xypoint.

Prior to joining Bardsley Associates, John was Director of Information Systems for Aldus Corporation, a major commercial software manufacturer.

10 Consultant Resumes

CONSULTANT PROFILE: JACKIE BARDSLEY



Jackie Bardsley is a Certified Management Consultant (CMC) with over 40 years of business and information systems consulting experience. Jackie specializes in business process design, organizational culture and design, IT strategy, project management, system selection, project assessment, conflict management, and group facilitation.

Jackie focuses on the organizational impact of technology and business processes, including leadership, communication, team dynamics, organizational change management, job design, job satisfaction, employee motivation, conflict management, and decision making.

Jackie founded Bardsley Associates Inc. in 1987.

PROJECT FOCUS

- Organizational impact of technology
- Technology strategy
- System and business requirements analysis
- Business process and policy analysis, design and improvement
- Project assessment and project recovery
- Selection and implementation of information systems
- IT performance, staffing and organization
- System design

CAREER HISTORY

- Bardsley Associates Inc., President and Founder, 1987-present
- Westin Hotels Corporate, Financial Systems Manager, 1985-1987
- Price Waterhouse, Staff through Senior Manager, 1974-1985

EDUCATION, CERTIFICATIONS, PROFESSIONAL ORGANIZATIONS

- BA, Economics and Accounting, first class honours, University of Newcastle on Tyne, England
- MS, Psychology, summa cum laude, CalSouthern University.

- Master's studies in Organizational Communication, University of Denver. Focus on organizational change management, critical thinking, decision-making strategies, conflict management, and instructional design.
- Graduate Certificate in Industrial/Organizational Psychology, The Chicago School of Professional Psychology. Focus on organizational culture, organizational design, employee motivation, conflict styles, MBTI assessments, management styles, and leadership.
- Graduate Certificate in Conflict Management and Alternative Dispute Resolution, University of Denver. Focus on mediation, negotiation, and group facilitation.
- Graduate studies and research in Psychology, including personality, psychopathology, psychotherapy, interpersonal conflict management, cognitive biases, group dynamics, character strengths, motivation, and attitudes to risk.
- CMC, Certified Management Consultant
- PMP, Project Management Institute
- FCA, Chartered Accountant in England
- Certified ScrumMaster (Agile Framework)
- Member and Past President, Institute of Management Consultants
- Member, Society for Information Management, American Psychological Association, Scrum Alliance, Association of Chartered Accountants in the US
- Former Technology Editor, International Journal of Management Consulting
- Speaking engagements: Seattle Chamber of Commerce, Business-to-Business Expo, University of Washington, Washington State Society of CPAs, Association of Women in Accounting, National Conference of the Internal Audit Association, Financial Executives Institute, the Institute of Management Consultants, and corporate retreats.

COMMUNITY SERVICE

- Member, Rotary Club of Seattle
- Past President, Treasurer, Board Member and Trustee, Seattle Rotary Service Foundation
- Board member and Treasurer, Boys & Girls Club
- Volunteer, UW Business School guest lecturer, Minority Business Mentors Program, Business Volunteers for the Arts, and many community service organizations

PARTIAL CLIENT LIST

Technology

Active Voice Corporation, Adobe Systems, Avidian, Corbis, Data Base Inc., Data I/O, Encompass Globalization, Envision Telephony, Isilon Systems, Microsoft Corporation, Onlineshoes.com, Onvia, Optimum Energy, Plymedia, Primus, Sierra Online, Vigilos, W3Net, World2Market.com, WorldCatch, World Wide Packets, WRQ/Attachmate

Life Sciences, Biotech, Medical

Harborview Medical Center, ICOS Corporation, Nastech, Plexus/SeaMED, UW Medical Center, Zymogenetics

Services

Administrative Systems Inc., Alaska Airlines, Ascentium, First Security Bank, InServe Corporation, Perkins Coie, Print Management, Slalom Consulting, Sparling, Two Degrees

Manufacturing and Distribution

Consolidated Metco, Gargoyles Eyewear, Oregon Aero

Non Profit, Higher Education and Government

Casey Family Programs, City of Mountlake Terrace, Gonzaga University, Lakewood Water District, PATH, Pierce County, Pierce County Utilities, the Port of Seattle, Puget Sound Blood Center, University of Washington, YMCA of Greater Seattle

PROJECT EXPERIENCE

- Advised business owners, executive teams and boards on information technology strategy, including appropriate levels of investment, risk management, and strategic alignment.
- Planned and facilitated executive, board and leadership retreats to deal with complex and sensitive business issues.
- Provided mentoring to CIOs, project managers and project teams.
- Designed and implemented IT governance structures for complex organizations to ensure appropriate IT decision making, funding and oversight.
- Analyzed business processes, defined requirements, developed Requests for Proposal, developed demonstration scripts, advised on vendor selection, assisted with contract and pricing negotiation, developed project risk mitigation strategies, designed data conversion plans, developed test plans and test scripts and managed the implementation of financial, billing, customer service, and human resources systems for over 100 clients in the public sector, private industry and the non-profit sector.
- Consulted on mergers and acquisitions, including the consolidation and alignment of technologies and IT organizations.
- Designed business-to-business, business-to-consumer, e-commerce and SaaS systems for a variety of industries including: wood products, seafood, health and fitness, photographic media, building permits, household furnishings and health care staffing.
- Managed the design and development of an on-demand staffing system for medical staff.
- Managed the design and development of an online auction and e-commerce Web site for a company selling home products and apparel.
- Managed the design and development of storage, transportation, scheduling, delivery and pickup system for a company in the off-site media storage business.
- Designed an industry portal and e-commerce Web site for the wood products industry.

- Designed a purchasing, accounts payable, vendor management, contract management, workflow and document management system for a County government.
- Provided project assessment and project recovery services, advising executive management on options for troubled projects. Advised on establishing good project management procedures and oversight.
- Designed management reporting systems, extracting data from financial and operational systems to provide meaningful information to support decision making.
- Designed incentive compensation systems to align compensation with strategic business drivers.
- Provided one-on-one coaching to executives on technology use.
- Advised the executive management teams of other consulting firms and software development firms on good business practices, including the development and adoption of structured requirements, software development, quality assurance and project management.

CONSULTANT PROFILE: JOHN BLANCHARD



John Blanchard has over 30 years of experience in information systems and technology. John joined Bardsley Associates as a senior management consultant in 1994 and specializes in strategic technology planning, requirements analysis and development, systems design, software development, packaged systems selection, systems implementation, software quality assurance and testing, business process improvement and project management. John has extensive experience in requirements gathering and business process analysis, including work with international organizations with users representing over 65 countries worldwide. John also provides services as a transitional CIO. Prior to joining Bardsley Associates, John was Director of Information Systems for a major commercial software developer.

PROJECT FOCUS

- Collaborating with senior executives and IT management to translate business strategy into a focused IT strategy and effective, actionable IT project plans and roadmaps.
- Analyzing business processes, developing requirements, selecting and implementing ERP, financial, CRM, legal, knowledge management, document management, life sciences, incident tracking, defect tracking, HR, recruiting, expense tracking, customer billing and other systems.
- Developing and documenting user stories and managing product backlog, quality assurance and testing for agile software development projects.
- Developing logical data models and implementing data warehouses, data marts, and management reporting systems to enable advanced analysis of customers, products and sales.
- Designing, developing and implementing product configuration and quoting tools.
- Developing integration strategies for financial, ERP, CRM, HR and other enterprise systems.
- Implementing Microsoft SharePoint-based legal matter and knowledge management systems.
- Business process modeling, analysis, improvement and optimization.
- Project portfolio management, portfolio governance and business value realization.

CAREER HISTORY

- Bardsley Associates Inc.: Management Consultant, 1994-present
- Aldus Corporation: Director of Information Systems, Manger of Systems and Applications, Senior Systems Analyst, System Administrator, Support Technician, 1985-1994
- Speakerlab/Compulab: Manager, 1978-1985

EDUCATION, CERTIFICATIONS, PROFESSIONAL ORGANIZATIONS

- BS – Cum Laude, University of Washington
- Professional training: Project Management, Agile, Enterprise Resource Planning, Lean Manufacturing, XML, Web Services, Data Modeling, Relational Database Development, SQL, Total Quality Management, Managing for Exceptional Performance, Work Group Systems
- Selected for City of Seattle Strategic Information Systems Planning Team

PARTIAL CLIENT LIST

Technology

Active Voice Corporation, Adobe Systems, Aldus Corporation, Microsoft, Primus, Sierra Online, Toll Free Cellular, Traveling Software, World Wide Wood, WRQ and Xypoint

Life Sciences, Biotech, Medical

ICOS Corporation, Plexus/SeaMED

Services

Alaska Airlines, Claremont Hotel, Leisure Care, Western Pioneer

Manufacturing and Distribution

Korry Electronics

Non Profit and Government

PATH, Pierce County

PROJECT EXPERIENCE

- Analyzed business processes, defined requirements, developed Requests for Proposal, developed demonstration scripts, advised on vendor selection, assisted with contract and pricing negotiation, developed project risk mitigation strategies, designed data conversion plans, developed test plans and test scripts and managed the implementation of financial, customer billing, sales and customer service systems for a variety of clients.
- Developed XML document formats and specifications to support sales transactions for business-to-business Internet trading exchange.
- Managed development and implementation of sales analysis data mart.
- Managed project to develop and implement data warehouse of customer billing information for wireless telecommunications provider.
- Managed project to define technical requirements for data warehouse pilot project for a large commercial airline.
- Designed and developed product configurator to support highly configurable technology products composed of hardware, software, various integration options and programmable software features.

- Managed \$4 million project to replace all corporate information systems, including distribution, finance, sales, marketing, and technical support with relational database-based applications software running on open systems hardware.
- Developed Strategic Information Technology Plan for a major manufacturer of medical systems.
- As Director of Information Systems, planned and architected technology environment for leading high technology company based on strategic and operational business objectives. Provided technology and leadership that supported revenue growth from \$5 million to \$240 million, from startup through IPO to merger/acquisition in 9 years.

11 Contact Information

11.1 MAILING ADDRESS

Bardsley Associates Inc.
PO Box 22439
Seattle, WA 98122

11.2 TELEPHONE

Tel: (206) 343-5930
Fax: (866) 804-2954

11.3 WEB SITE

www.bardsley.com

11.4 DIRECT CONTACT

Jackie Bardsley: jackie@bardsley.com (206) 795-0587
John Blanchard: johnb@bardsley.com (206) 276-4360

11.5 LICENSES

Bardsley Associates Inc. is a corporation licensed in the State of Washington and the City of Seattle. The company is 100% owned by Jacqueline Bardsley and is a woman-owned business.