

JAMES A. SWEENEY JR.

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SUMMARY

A highly disciplined, results driven executive with an exceptional record of success integrating people, process and technology to significantly improve business performance. Key strengths include:

- Extensive experience partnering with business and information technology stakeholders in order to analyze, architect and implement business process solutions. Particular depth in core financial systems and controls, security/compliance and core insurance applications.
- Exceptional record of success building, leading and managing the full life cycle of large complex initiatives (spends over \$50M annually with multi-year programs exceeding \$100M).
- As a big 5 management consultant leader with over 13 years experience, fully capable of aligning business strategies with complex initiatives in order to achieve business vision and objectives.
- Extensive knowledge in managing large systems portfolio management budgets (exceeding \$400M annually at two large fortune 200 insurance companies).
- Worked extensively with business segments in order to identify options and alternatives required for effective solution delivery against enterprise level goals and technology standards.
- Over 20 years combined progressive enterprise level IT leadership experience within insurance and the Tier I Professional Service Practices (specifically Financial Services/Insurance).
- An incisive analyst with very strong discipline, sense of urgency and drive for exceptional results balanced by excellent interpersonal and communication skills at the most senior level.

PROFESSIONAL EXPERIENCE

Liberty Mutual Agency Markets, Boston, MA
Vice President, Systems Portfolio Management

2007—2009

Managed business transformation and technology efforts for investments exceeding \$400 million on all property casualty business processes and related systems. Fully transformed system portfolio management practices for this \$11 billion P&C insurance unit of the \$29 billion Liberty Mutual Group.

- Led/prepared an extensive portfolio analysis which compiled/documented all agency market core applications. Facilitated an all day workshop for more than 40 business and IT executives identifying all core and redundant applications across all market segments. Enabled the company to identify redundant core applications for elimination, focused spending to maximize portfolio development/minimize maintenance costs, and established organization's first integrated technology roadmap establish by both business and IT.
- With the Safeco acquisition, Liberty's combined IT spend doubled to \$450M annually. To create manageable analysis, formalized and deployed five unique technology counsels organized by business requirements (Corporate/Operations, Personal Lines, Commercial Lines, Surety, and Claims). Provided a solid foundation to organize/oversee business and technology objectives based on business and IT partnering, as well as accurately scoped and forecasted delivery capabilities needed to manage customer expectations.
- Established a structured business PMO integrating six sigma methodologies with system development life cycle practices. This combined organization enhanced system portfolio management practices including the development of formal business case methodologies used to support investment decisions/measure success.
- Performed hands-on project management training/mentoring to project management groups in order to establish PM best practices, improve complex project execution, and enhance collaboration between business and IT stakeholders.
- Performed extensive project coaching/direction for four large complex initiatives (Claims-Guidewire, SAP Billing, and two custom Commercial Lines policy administration projects). Improved alignment between associated business objectives and corresponding technology architectures while increasing complex project success rates (from 0% to 100%).
- Prepared and facilitated monthly IT status report presentations to CEO and his directs. These meetings focused on strategic issues/risks that required senior executive direction and guidance.

Guardian Life Insurance Company of America, Manhattan, NY
Second Vice President, Head of Corporate Project Management Office
Associate Vice President, IT PMO

2004—2007

Transformed the IT project management office into a corporate-wide PMO providing services to both business and IT, while reporting to the CEO of this \$8 billion mutual life insurer. Communicated executive project status reports to the CEO, Office of the Chairman and Board of Directors.

- Working in a complex matrix environment, emerged as a trusted and competent project expert, collaborating with business segment senior executives throughout the full life cycle of their critical project initiatives with extensive focus during the project planning/start up phases. As a result, initial key project deliverables (scope documents, detail project estimates and initial business cases) were complete, consistent and thoroughly produced in order to gain approval by the Office of the Chairman.
- Re-engineered quality gates for application development efforts. This structured (Design/Building Permit) methodology tightened overall communication and highlighted interdependencies between business and IT committee members (Corporate Finance, Security, Infrastructure, and Architecture).
- At an enterprise level, re-engineered formal project management policy & procedures, focusing on key project areas: business case, budget, baseline, change controls and close out. These policy and procedures provided consistency required to obtain executive level project approval while also supporting project status reporting requirements needed throughout the full life cycle of a given project.
- Developed unique, formal quality/risk assessment methodology to be used to assess/identify “at risk” projects. This self-governing method allowed project business and IT sponsors to identify potential risk areas early, thereby allowing them to make timely corrective actions. Based on this technique, complemented by hands-on coaching and mentoring, complex project success rates increased from 40% to 80%.
- Deployed initially in IBM’s Associated Partner consulting role, continued day-to-day program director duties for a large PeopleSoft financials \$35M program. The program successful results included the retirement of a 30 year old legacy general ledger/financial reporting systems, as well as replacing accounts payable, asset management and budgeting applications. It also implemented outsourcing services for infrastructure hosting and application management.

IBM Global Business Services/PWC Consulting, Boston, MA

1998—2004

Associate Partner, BCS Financial Services
Director, Management Consulting Services, Financial Cost Management Practice
Principal, Management Consulting Services, Financial Cost Management Practice

Performed consulting sales and services within the firm’s Financial Services/Insurance practice, with specific service focus on large scale, PeopleSoft ERP systems (including Financials, Human Resources, Supply Chain and Enterprise Performance Management solutions).

- Performed business transformation strategy work with specific focus to the financial cost management value chain. A significant number of these strategy initiatives led to project management/integrator service engagements. Scope for most of these projects included core corporate functions (finance, human resource and corporate reporting).
- Performed day-to-day global project management for complex PeopleSoft Financials/Data Warehouse initiative at XL Capital. Established/managed five project sites, located in Dublin, London, Bermuda, Philadelphia, and Stamford. This on time, on budget successful project deployed the first-in-kind global project management methodologies along with the first implemented PeopleSoft packaged data warehouse solution called Enterprise Performance Management. This solution also provided the client with a common core financial application platform, including common financial processes/controls, supported by hosted infrastructure and application support.
- Performed troubled project turnaround services for a large PeopleSoft Financials/Shared Services transformation program. Discovered lack of discipline in client buy-in (change management) resulting in constant scope creep. Created a document to clearly express requirement/design solutions and obtained buy-in from executive stakeholders. Once final key requirements were finalized, instituted structured methodologies, strong project planning techniques and coaching/mentoring services to program members. Completed the project on schedule, meeting the chairman’s very stringent requirements.

IBM Global Business Services/PWC Consulting (Continued)

- For a global P&C insurance company, performed financial integration consulting services as part of their acquisition of a Japanese insurance company. Clearly translated business and technical requirements in order to produce an overall ERP financials strategy. Developed formal business case deliverables used to gain approval for a global financial ERP system initiative. Performed relative start up / planning phase activities – transitioning phase I (Japan) project to PWC's Oracle practice.
- Performed program director role for a large PeopleSoft Human Resources, Payroll, Financials and Supply Chain initiative. This program served to consolidate decentralized systems, creating a shared services environment at an enterprise level. Presented program status to Office of the Chairman on a monthly basis. This project included over 250FTEs and budget of \$150M.

Ernst & Young, LLP, Boston, MA

1997—1998

Senior Manager, Management Consulting Services Media/Entertainment Industry

Supported consulting sales and performed management consulting services within the firm's PeopleSoft practice.

- As project manager for complex PeopleSoft financials/distribution initiative, this project consolidated two subsidiary financial/supply chain business processes (and related systems). This system provided the initial structure and technology platform for company's corporate general ledger environment.
- Project Manager for an integrated PeopleSoft Financials/Human Resource initiative. This successful project represented one of the first PeopleSoft integrated purchasing systems deployed.

Price Waterhouse, LLP, Boston, MA

1993—1997

Principal Consultant, Financial Cost Management**Senior Auditor, Computer Information System Audit Services**

Performed lead integrator/business process services for Price Waterhouse's Financial Cost Management group. As a CIS Auditor, engaged to perform SAS70 system audits to firm's financial services clients.

- Based on deep accounting and financial package expertise, contracted to lead the chart of accounts design for a large P&C insurance company. This successful design consolidated three separate insurance company's chart of accounts into one (with common structure and detail values). It further satisfied various allocation, consolidation and reporting requirements, e.g., regulatory (STAT) and financial (GAAP) reporting.
- Performed consulting services on a PeopleSoft financials integrated general ledger, accounts payable and accounts receivable initiative. Wrote most of the design documents. Worked typically 15 hour days, 6 days a week including straight through the night as necessary. Went live on time/budget with high quality. This implementation represented the world's first integrated PeopleSoft GL/AP/AR system.

Prior experience as Corporate Controller/MIS Director for American Club Management Corp., Senior Consultant/Auditor for Tofias Fleishman and Shapiro, P.C., Senior Financial Analyst for FMR Corporation/Fidelity Investments, Staff Accountant for Bank of Boston and Programmer for Northern Data Systems.

EDUCATION

B.S., Accountancy

Bentley University

1985

OUTSIDE INTERESTS & ACTIVITIES

- Working with Bentley University Alumni Office, actively designing/implementing a coach/mentor program between Bentley Alumnae and its undergraduate students.
- Member of Project Management Institute and OWASP (Open Web Application Security Project)
- Enjoy family activities, boating, fishing, golf and fitness