

# F. PHIL CARTAGENA, JR., MBA, PMP<sup>(R)</sup>

148 Quincy Shore Drive #45  
Quincy, MA 02171-2931

617/750-1095  
resume@fierce.net

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## STRATEGIC BUSINESS SERVICES PROFESSIONAL WITH 15 YEARS EXPERIENCE AND AN OUTSTANDING SOLUTIONS DELIVERY & REVENUE GROWTH RECORD

### EXECUTIVE SUMMARY

**Qualifications:** Change management, business process redesign, program management, organizational transformation and restructuring, incentive compensation design and web-enabled application and product development.

Engagement management contributions involve the creation of technical and account service teams, articulating Statements of Work and developing & coordinating internal and external business professionals to deliver work products.

**Recent Highlights:** Managed global PMO replacing bank's IT infrastructure and data centers; Generated \$3MM revenue annually for 3 years; Implemented a major CRM (Siebel 7) system for a global information conglomerator in three months; Tripled product revenue to \$6MM in six months by designing and implementing product revision; Turned around a troubled 2.5-year web project and brought it to successful completion

**Industry Experience:** Life Sciences (2 years), IT (8), Financial Services – Banking & Insurance (4), Retail & Entertainment (3)

### PROFESSIONAL DEVELOPMENT

**Education:** MBA, **Columbia Business School**; BA, Computer Science, **Harvard University**

**Academic Honors:** Coca-Cola National Scholar and Harvard Club Scholar

**Adjunct Professorships:** **Boston University:** Systems Analysis and Design

**Eastern Nazarene College:** Relational Database Systems and Telecommunications; and Introduction to Networking Concepts

**Professional Certifications:** Siebel Certified Consultant (Siebel 7.7), Certified Project Management Professional (2004)

**Community Involvement:** Board Member (1995-7, 2005-7), Marketing Committee Chair, Corporate Member (1995-Present) People Making a Difference; Board Member, Columbia Business School Alumni Club of Boston: 2003–2006

**Publications:** *The Top Five Questions to Ask Prior to Implementing CRM*, January 18, 2005, DestinationCRM;  
*A Forecasting Fable*, December 5, 2005, DestinationCRM

**Additional Languages:** French, Spanish and American Sign Language.

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### CAREER HISTORY

**BUSINESSEGE SOLUTIONS, INC., Burlington, MA**

**December 2004 – Present**

*Engagement Manager, Program Manager*

IT Strategy Consulting firm focusing on Financial Services, Life Sciences, and Communications (*acquired by EMC 8/2007*)

NSLIJH: Program Manager and Process SME for hospital's infrastructure technology refresh & data center consolidation

- Corrected prior program plan's deficits; coordinated data accuracy initiatives; implemented steering committee reporting
- Facilitated program back to health to meet original delivery commitments

Microsoft: Program Manager, Process and Scheduling SME for data center consolidation/refresh (\$20MM budget)

- Created schedule and resource model to complete ~7000 data migrations to consolidate from 212 → 11 Arrays
- Managed internal EMC process for department coordination/resource sharing and monthly expectation setting updates

Hospira: Program Manager, Process and Benefits Realization SME for IT organizational restructuring (\$100MM budget)

- Managed benefits articulation and realization training workshops; implemented tools to capture projected & actual
- Led organizational and IT projects reprioritization and restructuring initiatives (Mfg, IT outsourcing/offshore, SAP)

HSBC / Hong Kong: Program Management subject matter expert leading data center PMO (managing \$10B daily transactions)

- Implemented reporting mechanisms and managed the data center deployments of multiple wave migrations in UK/HK
- Coordinated 30 teams in the overall program handling business continuity and other IT operations priorities

Marsh, Inc: Program Manager leading Business Management Office for the Middle Market business

- Facilitated parties involved in corporate restructuring effort via integrated milestone plan and reporting mechanisms
- Drafted and ran 3-day strategic offsite agenda to operationalize newly-created Middle Market business plan
- Managed proposal, client presentation process and project execution for seven additional initiatives worth ~\$3.5MM

Merrill Lynch: Program Management subject matter expert leading PMO for P&L & headcount reporting initiative

- Implemented the project management processes in the areas of planning, control and communication
- Managed the spec creation around report formats, Hyperion cube design, and FDW data transport design

Jefferies & Company: Program Management subject matter expert leading project management office creation

- Designed and managed the implementation of a pre-PPM resource management and utilization tool for IT organization
- Facilitated workshops and interviews to gather information on project lifecycle and management practices

Pacific Capital Bancorp: CRM and Program Management subject matter expert in the project management office

- Managed *TouchPoint* business analyst team/vendor and instituted more structured status reporting processes
- Created the conversion weekend project, logistics and support plans and chaired command center operations

Bank of America: Siebel SME assessing environment for CRM system consolidation

- Led investigation of SOA opportunities for SFA functionality for Wealth Investment Management (WIM) group
- Created the interview strategy for understanding the organizational circumstances around which SFA was used

## **THE FISHER GROUP, Beverly, MA**

**April 2001 – December 2004**

*Partner, Co-Founder, Chief Information Officer*

Consulting firm focused on customer centricity via coordinated sales, marketing and service groups

Overview: SME for Sales Force Transformation, Change Management, Business Process Redesign, Forecasting and CRM

- Fully participated in client segmentation and business development activities and responsible for 20% of revenue
- Responsible for the firm's technology and knowledge management infrastructure

Deutsche Bank: SME and PM for design and prototype creation of a new product

- Gathered requirements and documented process and communication with clients and team members

OneSource Information Systems: Program Manager & Siebel 7 and Business Process SME

- Led the capture and redesign of customer acquisition, management and service processes
- Held sales person interviews and focus groups in US and UK locations for sales force transformation
- Performed vendor requirements gathering, selection and negotiation process for CRM package and integrators

TeleGea Systems: process SME helping the company penetrate target clients and perform market research

- Performed market research on their specific companies and penetrated Sprint, MCI Worldcom, AT&T
- Interviewed key members of those companies and mapped out their VPN provisioning processes

Centiv Systems: SME performing market research and prototype development of incentive compensation modeling product

- Prototyped an add-on modeling product to primary incentive compensation software package
- Authored proposal to serve as support to their sales staff bringing incentive compensation expertise

**THE VOICE WORKS, Norwood, MA**

**July 2000 – March 2001**

*Director of Application Development*

Product company implementing a software alternative to traditional call center telephony infrastructure

Overview: Senior architect for a CRM-integratable call center operations management product released in 1Q2001.

- Participated in the planning and release of the company's corporate web site
- Prepared development estimates, product release schedules and design specifications for multiple version releases
- Authored, owned and maintained the master functional specification and design documentation

**GIGA INFORMATION GROUP, Norwell, MA**

**Sept. 1998 – June 2000**

*Director of Development and Interim CTO*

IT advisory and consulting firm acquired by Forrester, Inc. in 2003

Overview: Managed \$10M annual budget and served as strategic thought leader for account service, product development, internal systems development, advanced technology research and QA departments

- Led the design & implementation for flagship product revision resulting in \$50M in revenue growth for two years
- Enabled \$750K in additional revenue by designing products with business partners: Compaq, Sprint and BT London
- Grew team from 7 to 30; increased individual productivity metrics by >50%; created career & training paths bringing turnover from 40% to 0 in 6 months in 1999

**SAPIENT CORPORATION, Cambridge, MA**

**June 1996 – Sept. 1998**

*Project Manager, Webmaster*

Systems integration and consulting firm

Overview: Following promotion, managed three web developers as well as three to seven technical & design sub-contractors

- Created one of the first function-rich departmental intranet sites and first three corporate web presences
- Participated in RIP® engagements for Bank Boston's v.1 HomeLink and workflow sites for the State of Minnesota
- As webmaster, the firm's Intranet won the *Webmaster's 50/50 Award* in 1997