

# Carolyn N. Evans



**Business Architect · Functional Software Design · Process Architect**

## CONSULTANT PROFILE

Carolyn has more than 25 years experience helping organizations optimize, design, build and align core business process and software technology interactions within both departmental and enterprise-wide strategic initiatives. The results are practical, innovative solutions that effectively solve real business challenges, enhance knowledge worker and customer experiences, increase business efficiency and agility, reduce costs, and measure on-going performance to achieve corporate business objectives.

Carolyn has extensive experience in engagement management, business process management, business architecture, functional software architecture and design, business requirements and rules management, collaboration and content management platforms, customer relationship management, and business software projects with a strong emphasis on supporting corporate strategy through business process optimization and process enabling technology solutions. Carolyn possesses a wide range of business experience and technical knowledge providing the ability to achieve holistic, mature, long-term business and technology interaction design solutions quickly, efficiently and with measureable results.

### Tools, Methodologies and Deliverables

- Process and Enterprise Maturity Assessments - PEMM™
- Business Architecture Requirements and Strategies
- Business Process Discovery, Analysis and Design
- Conceptual Business and System Modeling and Design
- Functional Process Decomposition Analysis and Design
- Process Modeling and Design with Systems Interaction
- Business Rules, SWOT Analysis, Measurement Systems
- Voice of the Customer Analysis, Value Stream Mapping, Break Points
- Process Engineering and Optimization: Six Sigma and Lean Methodologies
- SIPOC Diagrams, Failure Mode and Effect Analysis, Root Cause Analysis
- IT: Functional Software Design, Requirements and Business Rules
- IT: State, Interaction, Use Case, Sequence, Activity - UML Diagrams
- IT: Use Case and Functional Business Requirements Specifications
- IT: Hi-Fidelity, 3-D Business Software Requirements and Simulations

### Process, Quality, IT Certifications

- BPMN, ITIL® v3 Foundation
- Business Process Transformation Framework: ICIM Certification Level 1
- Certified Process Manager: Practioner—CPM-P
- Certified Process Professional—CPP
- Six Sigma Masters Certificate
- AIIM® Fundamentals of Enterprise Content Management System Architecture
- Business Computer Programming Certificate

### Business Software Applications

- IBM® Content Manager, WebSphere
- EMC® Documentum, eRoom
- Stellent Acorde Imaging/BPM; Kofax Ascent Capture
- Vignette® Collaboration; Ultimus and TIBCO BPMS
- MS Dynamics GP, AX, SL, CRM, SharePoint
- Salesforce.com®, Siebel, Vantive, Corticon™ Business Rules Management System

### Methodologies | Frameworks | Stds

- Business Process Management,, PEMM™, BPMN, IPTF®
- TOGAF™, eTOM®, FEAF, Zachman™, APQC®, BPTF, ICIM
- Six Sigma, Lean, Value Chain/Streams, Value Reference Model - VRM<sup>SM</sup>
- Agile and Lean Development, Iterative and Waterfall SDLC
- RUP®, SCRUM, UML®, ITSM/ITIL®, COBIT®

### Functional Areas of Expertise:

- Enterprise Content Management
- Business Process Management
- Business Rules Management
- Imaging, Document Management
- Collaboration, Portals
- Knowledge Management
- Records Management
- Email Archiving and Compliance
- Customer Relationship Management
- Marketing and Sales Force Automation
- Inventory and Warehouse Management
- Enterprise Resource Planning, Accounting and Finance
- Property and Casualty Insurance: Policy Administration, Claims
- IT Operations Management, Help/Service Desk
- Contact/Call Center, Tele-Business
- eProcurement, eCommerce

# Carolyn N. Evans

**Business Architect · Functional Software Design · Process Architect**



## CONSULTANT PROFILE

### Business, Organization and Technology Experience

PRINCIPLE CONSULTANT - RECENT ENGAGEMENTS INCLUDE:

**Business Process Improvement and Transformation Project/Insurance:** Developed company's first Business Architecture, Value Chain/Streams Models, Business Process Architectures using ACORD framework, standardized BPA methodology/artifacts for a global P&C insurance/reinsurance company. Led a team to improve value in underwriting operations through three significant process redesign and technical work streams which moved underwriting from a manual/transactional environment to a BPMS framework (TIBCO) with EAI to legacy systems and complex data integration from internal and external sources. Designed first measurement system for base lining underwriter capacity, and efficiency through an end-to-end value stream. Increased overall process cycle times by, on average, 45+%.

**Business Architect and Functional Software Design Roles:** Designed and created conceptual business, system and functional process and interaction models by level and phase. Wrote/diagrammed artifacts/models and design documents to support the agile SDLC methodology for a large subsidiary of a \$1B utilities contractor company enterprise IT business systems rewrite project. Work products communicated scope, complexity and system interactions design at Executive and IT levels while providing development with detailed functional decomposition and explicit business rules. Worked extensively with Data Management team to ensure the data model supported all software processes and rules.

**Business Rules Project—Billing and Claims:** Business Rules extraction and technical translation project organizing and documenting contract billing and claims rules for a large subsidiary of a \$1B utilities contractor company to support an enterprise IT system rewrite project.

**Business Process Management Software Search Project:** Software RFI/RFP and vendor selection for BPMS with subsequent implementation. BPM projects included MS Dynamics ERP and SharePoint integration, claims, and operations process automation — Ultimus BPM v8.0.

**Stakeholder Requirements Project:** Functional Requirements Specifications and project artifacts for \$1B utilities contractor holding company to support IT deployment of new ERP system through 25 subsidiaries – document use cases, requirements, rules, document capture and management and BPM. Software RFI/RFP and vendor selection for BPMS and subsequent ERP integration implementation projects.

**Business Process Discovery Project:** Completed a full BPM architecture model for one subsidiary of a \$1B utilities contracting company to support deployment of new ERP system; 88 documents, 155 diagrams/models in three months – process models, systems activity, data flows.

**Business Systems Discovery Project:** Documented and diagrammed current state systems interaction, messaging and data flow for a vehicle auction service provider including national physical auction sites, online auctions, interaction with 3<sup>rd</sup> party suppliers, partners and customers.

### LEAD BUSINESS ANALYST, ENTERPRISE CONTENT MANAGEMENT TECHNOLOGIES FOR LARGEST HOME IMPROVEMENT RETAILER

Carolyn executed enterprise-wide growth and renewal business process analysis project work for Enterprise Content Management and Portal technologies supporting EMC Documentum, IBM WebSphere, and Stellent Imaging/BPM. She worked with various business groups to deploy and support collaboration technology across the enterprise. Carolyn produced detailed deliverables such as business cases, project charters, business process modeling, workflow and activity diagrams, current and future state diagrams, and business requirement specifications within a structured ITSF SDLC framework. She engaged, led, and maintained business relationships on large complex business projects and identified a high-profile Customer Care project integrating Documentum to the legacy CRM system handling customer complaints to the CEO. Carolyn's efforts in process re-engineering discovery and new technology solutions led to a reduction of workflow steps by 45%. Additionally, she developed a non-IT process solution reducing the footprint of a legacy imaging system slated for sunset by 30% more than project scope required.

# Carolyn N. Evans



**Business Architect · Functional Software Design · Process Architect**

## CONSULTANT PROFILE

### VICE PRESIDENT OF TECHNOLOGY FOR AN INSURANCE COMPANY

As VP of Technology, Carolyn was responsible for managing the corporate IT department supporting 3 national locations and 20 network operations, help desk, development and quality assurance staff. She participated in Merger and Acquisition activities including assessment and the smooth integration of acquired company's technologies. Carolyn was responsible for a \$2M budget including IT purchasing, vendor management, and contracts. She wrote the first IT policies and procedures manual. Carolyn contracted and worked with a vendor team to implement the company's first Intranet and collaboration platform using Microsoft SharePoint and various third-party tools, and their first VoIP telecommunications platform, all deployed nation-wide.

### DIRECTOR OF BUSINESS PROCESS FOR AN INSURANCE COMPANY

In an operations role, Carolyn led Lean Six Sigma, process design and re-engineering projects and focused on improving workflow efficiency over cross-functional areas including enterprise document management. She was responsible for project management, root cause analysis, value stream mapping, process capability studies, process and procedure documentation, and creating and presenting toll-gate reviews to the Executive and IT Steering Committees. Direct results included the reduction of non-value-added workflow steps by 35% in the company's insurance application submission processing cycle while increasing overall underwriting throughput and efficiency over 20%.

In an IT role, Carolyn functioned as the Lead Business Analyst on a large iterative rapid-application .NET development project to automate all insurance processing functions and client support processes replacing all current legacy systems. She worked with the CFO and finance team as the Lead Business Analyst on a concurrent ERP implementation project and was responsible for all integration data requirements and functional specifications between systems, including the implementation of a finance business portal. Work products produced from requirements gathering sessions were workflow analysis, business process mapping, user interface wireframes, business use cases, software requirements and GUI specifications including object, use case, sequence, activity, logical data diagrams using UML compliant modeling tools and RUP methodology. Carolyn was solely responsible for documenting the business requirements for all money-movement areas of the business as well as Underwriting, Policy Processing, Producer Self-Service and Claims systems. She participated in unit, system, and user acceptance testing and conducted end-user training on the new systems.

### ENTERPRISE CONTENT MANAGEMENT PRACTICE MANAGER FOR AN IT RESELLER

Carolyn was tasked with the marketing and start-up of the 25-year-old company's first business software practice. The practice focused on leveraging Enterprise Content Management technologies to create new revenue opportunities with existing and new clients nation-wide. She was responsible for researching and building software vendor partnerships and functioned as the internal subject matter expert for all business application solution offerings and opportunities including ERP and CRM. Carolyn identified, cultivated, and developed up to \$1M worth of software license and professional services projects for ECM solutions within the first six months for document imaging, business process management, and collaboration technology solutions. She personally conducted scoping studies, requirements gathering, and business process gap analysis sessions with large prospect user communities for Fortune 1000 clients, documented respective use cases, and worked with the appropriate software vendors to design, document, and present solutions to executive audiences.

### DIRECTOR OF SALES AND TECHNICAL SUPPORT FOR A SOFTWARE RESELLER

As Director of a software reseller company focusing on content management, records management, and email archiving and compliance software, Carolyn managed multiple pre-sale and engagement projects for financial services clients. One project was for a multi-billion dollar stock brokerage on Wall Street where Carolyn managed the successful on-site installation and implementation of a leading email archiving system integration for SEC and Sarbanes-Oxley compliance initiatives.

# Carolyn N. Evans



**Business Architect • Functional Software Design • Process Architect**

## CONSULTANT PROFILE

### E-BUSINESS TECHNOLOGY CONSULTANT FOR A LARGE INDUSTRIAL PUBLISHER

Carolyn operated as a marketing, Internet, e-Business, and sales consultant to a variety of clients in multiple business-to-business industries and verticals. Her responsibilities included industry research, positioning statements, competitive marketing analysis, and successful differentiation strategies. Duties included heavy project management with very tight deadlines and minimal input from the client. She designed and developed the architecture and content for several dozen large commercial web sites with hosted online catalogs and e-commerce capabilities including customized Request for Quote systems and sales lead management functionality. Carolyn captured \$250K in eBusiness sales in the first 6 months and was subsequently inducted into the National 1st Years Sales Honor Role for the 100 year old publishing company. Concurrently, Carolyn maintained a long-term contract with an ERP software and AS/400 technology sales and services firm. She was solely responsible for the company's marketing and sales activities which consisted of presentations and prospect requirements analysis sessions resulting in custom proposals and deal financials. Carolyn also managed the partner relationship and marketing co-events with IBM.

### VP OF OPERATIONS AND PRESIDENT/CEO FOR A CUSTOMER RELATIONSHIP MANAGEMENT SERVICE FIRM

Carolyn directed 25 employees in the business operations of a Customer Relationship Management service bureau. Her duties and responsibilities included managing the company's IT, call center, finance and accounting, client services, marketing and sales efforts. She consulted with executive clients on the analysis, design, development, and implementation of large CRM, sales lead management, and literature fulfillment programs with call center marketing services and analytics. Carolyn presented, negotiated and closed major accounts at the Senior Executive level to companies such as Mobil, Pennzoil, General Electric, AT&T, ITT, Timken, Duracell, Stanley Tools, Georgia-Pacific, ABB, Philips, and AlliedSignal. She was solely responsible for all corporate purchasing and the selection of over \$1.5M of hardware, software, and telecommunications equipment. Carolyn facilitated on-going client relationships and managed the Client Services staff. She mediated, when necessary, highly political client environments. She maintained average services contract tenure of ten years and was able to successfully increase client revenue an average of 20% annually.

Carolyn managed the IT staff of business and data analysts, developers, and network operations engineers. She served as project manager, business analyst, architect, and lead developer for over 500 customized CRM, SLM, tele-business, and direct marketing campaign software projects built on mid-range IBM AIX and HP UNIX platforms. As VP of Operations, Carolyn was responsible for accelerating productivity 17% with new training and technology integration. She personally performed the redesign, enhancement and migration of active custom client applications and data, adding extensive new CRM and database marketing capabilities. She personally migrated all applications and data from an IBM SYSTEM/36 to an RS/6000 completing the project within its 6 month schedule without any service interruption. The new system added significant service capabilities to the company's offerings portfolio which helped drive revenue growth by 35%.

Carolyn was also responsible for conducting on-going conceptual, logical, and physical analysis on internal and external client business process optimization requirements and performance tuning. She designed, coded, and implemented new business software applications to track and improve call center, customer service, and client deliverable performance which slashed overhead 15% in the first six months of implementation. Carolyn sold the multi-million dollar services company to a leading northeast marketing firm in 1999.

### PROGRAMMER / ANALYST AND SYSTEMS ANALYST FOR LARGE AEROSPACE COMPANY

Carolyn functioned as a programmer / analyst and systems analyst supporting a large IBM mainframe online ERP software package designed for the aerospace spare parts industry. Large-scale projects included customization work for British Aerospace, Fokker Aircraft, and a complete rewrite for Sundstrand. Carolyn participated in a two-month scoping study with British Aerospace as Lead Business Systems Analyst resulting in a major software customization project. She acted as backup to the lead programmer during all cycles of the project, including client installation at British Aerospace in Hatfield UK. Carolyn was responsible for coding the Backorder, Quotation, and Accounts Receivable subsystems.

## About Us

**OnKue ByDesign** provides consulting services which help businesses reduce risk and increase process-centric initiative success through the application of OnKue "ByDesign" disciplines.

**Design** is a term often used to represent the visual aesthetics of an artifact however design, at its root, has little to do with the visual and much to do with the intellectual. Things done with a sense of planning, purpose and method are done "**by design**".

**ByDesign** initiatives, by their very nature, focus on connecting corporate strategy to project execution.

Those organizations that best control and exploit information and knowledge "**by design**" will be the ones to pull forward in terms of strategy and competitive advantage.

## Connecting Strategy To Execution

### >> ByDesign Disciplines

- Enterprise Business Architecture
- Business Process Management
- Business Rules Management
- Business Requirements Management
- Functional Software Design
- Business Technology Analysis

### >> Frameworks | Reference Models

- The Open Group Architecture Framework - TOGAF™
- Federal Enterprise Architecture Framework - FEAF
- Enhanced Telecom Operations Map - eTOM®
- APQC® Process Classification Framework - PCF
- Value Reference Model—VRM<sup>SM</sup>
- Integrated Process & Technology Framework®
- Information Technology Infrastructure Library - ITIL®
- Rational Unified Process® - RUP®

### >> Functional Areas

- Enterprise Content Management - ECM
- Imaging & Document Management
- Collaboration, Portals, Intranets
- Knowledge & Records Management
- Customer Relationship Management - CRM
- Enterprise Resource Planning - ERP
- Marketing & Sales Force Automation
- Inventory & Warehouse Management
- IT Operations Management/Service Desk
- Insurance Claims, Policy Administration
- Accounting & Finance

### >> Commercial Business Software

- Microsoft® SharePoint
- Microsoft® Dynamics CRM, SL, AX, GP
- Salesforce.com®, Siebel, Vantive
- IBM® Content Manager
- Vignette® Collaboration
- Kofax® Ascent Capture
- Stellent/Acorde Imaging and BPM
- EMC® Documentum, eRoom, Captiva InputAccel
- Ultimus® BPMS, TIBCO® BPM+

### >> Methodologies | Standards

- Six Sigma Black Belt, Lean
- Waterfall, Iterative, Agile, Lean SDLC, SCRUM
- Structured & Object-Oriented Analysis & Design - OOAD
- Unified Modeling Language™ - UML®
- Business Process Modeling Notation - BPMN
- Process and Enterprise Maturity Assessments - PEMM™

### >> Commercial Tools

- Microsoft® Office Visio
- Process Modeler for Visio
- Enterprise Architect (Sparx)
- TIBCO Business Studio®
- Metastorm ProVision®
- Ultimus BPM Modeler®
- Blueprint Requirements Center™
- ILOG JViews BPMN Modeler®
- Embarcadero® EA/Studio™
- Corticon® Business Rules Studio
- Casewise® Corporate Modeler
- MindMap, Axure, iRise®
- Embarcadero® ER/Studio®
- DB Visualizer, Process Modeler 5

### >> Vertical Industries

- Aerospace
- Utilities Construction
- Manufacturing
- Online Auctions
- Insurance: GL - P & C
- Wholesale Distribution
- Call/Contact Center
- Professional Services
- Value-Added Reseller
- Marketing Services & Media: Online & Print



### >> Professional Certifications

- BPMN and ITIL® v3 Foundation
- Six Sigma Green/Black/Lean - Masters Certificate
- Process Manager-Practitioner - (CPM-P)
- Certified Process Professional - (CPP)
- Integrated Continuous Improvement Methodology - (ICIM) Level 1 Framework and Process Design Principles
- AIIM® - Fundamentals of ECM System Architecture