Dave is an experienced **Senior** **Project/Programme Manager** with a career in Change in the

Financial Services sector.

Responsible for managing many transformational programmes, product launches and mission-critical infrastructure renewal and migration projects. He is an organised and disciplined PRINCE II accredited Project Manager and **Certified Management Consultant** (CMC) with excellent leadership

qualities and communication skills, practiced in many development methodologies including Agile.

**Industry Experience**

Financial Services

Retail & Commercial Banking

Credit & Debit Card Issuing and Merchant Acquiring

Digital Wallet

PoS/ATM Authorisation and Transaction Processing (inc Base 24)

Payments, Sanctions

Card Platform Migration

Investment Banking

Skills & Competencies

Programme / Project Management

Consultancy

Change Management

Process improvement/re-engineering

Stakeholder and Communication   
Management

Requirements Gathering / Business Analysis/ Process Modelling

Facilitation

Career History

Self-Employed Management Consultant

Oct 2014 – Date Cards & Loans Programme Manager Bank of Ireland

Managing the programme to launch four new credit card products and a two new loan account products in a new joint venture with The AA. The responsibilities included managing many third parties, some offshore resources and a budget of over €5M. Then launching a new Loans product using different third parties, with outsourced operations and fulfilment.

**July 2013 – Oct 2014 Implementation Project Manager TSYS Managed Services**

Project Managing the delivery of a contact centre operation to support a new card launch for Virgin Money. Achievements included the improvement in project Governance including the clarification of delivery scope and the implementation of a formal change control process. Initiation and development of a Balance Transfer/Money Transfer Fraud Management application using Agile techniques.

**Oct 2011 – Apr 2013 V.me Digital Wallet Project Manager Visa Europe**

Project Managing over 40 members of the Proposition & Product Workstream including Product Owners and the User Interface Design, User Experience testing teams and those involved in developing the scheme operating regulations for the V.me by Visa eComm wallet.

July 2011 – Sept 2011 Implementation Project Manager Lloyds Banking Group

Managing the Implementation Workstream of the Operational Reconciliation assurance processes of data related to 31M accounts and £216BN of value migrated from the HBOS systems to the Lloyds Banking Group’s platforms.

**Apr 2011 – June 2011 Migration Programme Manager Tesco Personal Finance**

Managing the migration elements in the card migration programme moving the card portfolio from the Royal Bank of Scotland to Tesco Bank.

Mar 2010 – Jan 2011 Senior Change Manager Barclaycard

Managing the delivery of an organisationally complex (£3M budget with an extended team of 30 and involving 4 third party suppliers) project to launch international Commercial Payments (Corporate and Purchasing) products into new international markets and provide a base from which to launch further products into further geographies.

**Achievements included;**

* **Recovered a failing project**
* ***Delivery of the capability to issue Commercial Payments products in new geographies***
* ***Approved requirements, end-to-end functional design, revised Operational design, Acceptance Criteria***
* ***Production of new collateral and processes***
* ***Risks mitigated by:***
  + ***Introducing effective project Governance (inc. creation, maintenance and distribution of comprehensive RAIDs log)***
  + ***Adherence to good-practice project management standards and conventions***
  + ***Introducing effective, project-wide communication protocols***

Sep 2009 – Jan 2010 Project Manager Wincor-Nixdorf

As part of the strategic ATM Refresh Programme; managing the development and deployment of the replacement software stack for the in-branch paying-in machines. Additionally, managing the initiation of the ATM Dynamic Currency Conversion project. Both developments operate on the Base 24 platform.

**Achievements included;**

* ***Delivery of the tested software stack for the CCDM devices***
* ***Delivery of the DCC High-level Design/Feasibility Document***

May 2008 – Mar 2009 Programme Manager/Consultant Barclays

Interim Programme Manager of a £20M regulatory Sanctions Payments Programme; responsible for software development and IT infrastructure delivery programmes, supported by four project managers and a Work Reception function, accountable to the Business Programme Manager and, in conjunction with the Sanctions-Customer Programme Manager, reporting to the Programme Board. A proportion of the software development team was located in Bangalore.

Latterly providing consultancy and assurance during an extensive cross-business, internal Audit exercise covering KYC, AML and Sanctions regulations. Many of these Observations focussed on the improvement of operational processes.

**Achievements included;**

* ***Creation and introduction of a new work reception process for this Programme***
* ***Delivery of the fault tolerant infrastructure for Sanctions Payments***
* ***Overcame an impasse between the business and supplier to create a scoped and planned deliverable***
* ***Enhanced the engagement process with the organisation responsible for testing***
* ***Introduced a Release Management Governance process***
* ***Took over the relationship management of the third party supplier***
* ***Production of the template Observation Response document***
* ***Production of many Audit responses in conjunction with the respective Accountable executives.***

Jul 2007 – Apr 2008 Programme Manager VocaLink

Managing a £5.8M business development Programme to enhance an ATM Managed Services market offering to Independent ATM Deployers and Financial Institutions; supported by (and mentoring) five project managers new to the organisation and managing separate software development and service enhancement/procurement teams. Each workstream introduced new business processes and/or had significant impact on existing processes; compliant with card scheme rules, where appropriate. All transaction processing developments operate on Base 24.

**Achievements included;**

* ***Managed the successful analysis, design & development phases of the Programme***
* ***Delivery of the first business change project; involving the first iteration of the ATM web-portal Helpdesk solution.***

Apr 2007 – Jul 2007 Project Manager TSYS

Managing the final development, testing and implementation phases of the change project introducing a new process to comply with Visa Account Updater (VAU) initiative for 11 clients across the Consumer and Commercial card portfolios.

**Achievements included;**

* ***Introduced the project management process, in conjunction with the member banks involved***
* ***Managed the main software development teams which are based in the US***
* ***Creation of the project plan (with commitment from member banks) to deliver VAU compliance in accordance with Card Scheme deadlines.***

Mar 2007 Project Manager LloydsTSB

A short consultancy assignment to review, assess and validate the programme organisation and initiation and assist the programme manager with the set-up of the Programme Governance of a major card migration programme.

Oct 2006 – Feb 2007 Business Change Project Manager Barclaycard

Managing the IT delivery to support the migration of a store card portfolio to a new card issuing platform (From GE to Vision Plus at FDI). Working on behalf of a joint venture between a major UK bank and a national department store providing the capability to also launch new card products and associated services from the same solution.

**Achievements included;**

* ***Delivery of the detailed data mapping design documents***
* ***Preparation of the test and acceptance approach and plans.***

LogicaCMG plc

Oct 2005 – Oct 2006 Portfolio Manager Barclays

Managing the Group IT portfolios for Barclays Capital and Barclays Global Investors. Prioritising resources, resolving issues and responsible for software development across the broad spectrum of payment systems, credit risk management and core banking projects. Managing a challenging relationship between Barclays Group IT and demanding, senior stakeholders in Barclays Capital.

**Achievements included;**

* ***Introduced a new work reception process***
* ***Developed a new method to track and review progress on all developments***
* ***Convened and chaired regular review meetings with senior stakeholders from the client and representatives from the supplier.***

Mar 2005 – Sept 2005 Business Change Project Manager LloydsTSB

Managed the study phase of an initiative to re-engineer the account opening solution to recruit business banking customers and deploy a screen-based solution. Working with the Business Analysts, six-sigma experts (and senior suppliers where necessary) to deliver the ‘Best requirements Document’ Group IT had ever received and produced the business case which secured executive sponsorship of the development. The core card issuing platform was provided by First Data.

**Achievements included;**

* ***Defined, mapped and analysed the account opening process and developed the replacement process***
* ***Managed the production of the Training Needs Analysis and development of the training approach.***

Apr 2004 – Feb 2005 Card Services Consultant Saudi Arabia

Commissioned by the Saudi Arabian Monetary Agency, developed and documented the national debit card scheme rules in conjunction with the member banks in Saudi Arabia.

**Achievements included;**

* ***Delivery of presentations at seminars involving all member banks***
* ***Successful analysis and communication of all aspects of Debit Card Management***
* ***Delivery of the documented card scheme rules.***

Oct 2003 – March 2004 Business Change Project Manager LloydsTSB

Managing the requirements definition and functional design phases to develop and deploy a branch-based, streamlined cardholder recruitment application.

**Achievements included;**

* ***Consulted with senior stakeholders to define the critical success factors and ensuring the new processes satisfy all requirement***
* ***Managed the analysis team and six sigma consultant to ensure requirements and proposed processes are defined and documented fully and accurate.***

Mar – Sept 2003 Euro Consultant Dept For International Development

Initiated and orchestrated the business and technical analysis to provide a Euro readiness assessment and plan for a government department.

Nov 2002 – Feb 2003 Lead Consultant for Chip & PIN Card Services

Leading an initiative to collate LogicaCMG’s Chip & PIN capability and communicate to key clients. Liaison with major UK issuers, card schemes and payment organisations undertaking further market research, developing LogicaCMG’s card issuer, acquirer and smart card offerings.

July 2002 – Nov 2002 Business Change Project Manager LloydsTSB

Managing the project to develop and effect a capability to issue Internet-based, co-branded credit cards. Planning the migration strategy and managing the significant changes to the operational model. The service was built upon the First Data card issuing platform.

Sep 2001 – Jun 2002 Communication Manager Barclays

Managing the communication aspects to circa 39,000 business and IT staff impacted by the deployment of their IT strategy and the change to the new corporate technology infrastructure.

Dec 2000 – Aug 2001 Euro Programme Manager ING

Co-ordinating analysis of the euro impact on Baring Asset Management; together with the specification, development, testing and implementation of the required changes to reflect Greece’s adoption of the euro, the abolition of legacy currencies and the introduction of euro notes and coin at the end of 2001.

Self-Employed Management Consultant

Jun 2000 – Oct 2000 Management Consultant Dotcom start-up

Develop a business case and secure investment (Venture) capital for a New Media company, Exactmedia, proposing to broker banner-advertising on the Internet using new software linked to a consumer-targeting database.

**Achievements included;**

* ***Prepared the Business Plan, allocating roles and responsibilities, convened and chaired regular Board Meetings***
* ***Secured an undertaking from a High street bank to fund the expansion plans of the company (without the need to surrender company equity).***

Aug 2000 Management Consultant GLP Health Care

Prepare a partnership proposition for a Care Home Agency (dealing with the buying and selling of Care Homes) as they looked to set-up in partnership with a national construction firm to build and commission new Care Homes.

NatWest plc

Mar 1999 – May 2000 e-Services Consultant Banking

Creation of enterprise-wide standards. NatWest had recognised and acknowledged that two of its core systems, namely email and Intranet, were dysfunctional. This was in spite of years of repeated attempts to implement an IT strategy involving group-wide technology standards.

**Achievements included;**

* ***Instigated a participative approach to standards creation and enforcement aligned with a comprehensive communication process***
* ***Delivered enterprise-wide interoperability for the email and Intranet services.***

Feb 1997 – Apr 1998 Internal Consultant Card Services

Dave undertook an assignment to assist in preparing the Card Services businesses for the introduction of the euro.

**Achievements included;**

* ***Working across the UK and mainland Europe, delivered presentations to senior stakeholders***
* ***As the focal point for business and technology staff, instigated the successful analysis methodology.***

Oct 1996 – Jan 1997 Internal Consultant Card Services

Consultancy to both Card Issuer and Acquisition businesses of NatWest, working with American Express to launch the first co-branded Amex card.

Feb 1996 – Jun 1996 Project Management Consultancy Card Services

NatWest had negotiated a partnership deal with Tesco to launch and support their CLUB CARD PLUS product for the First Data card issuing platform.

During the latter phases of the project, Dave undertook a phase of consultation with all the business, user and technology representatives to implement a communication and management process for the project.

**Achievements included;**

* ***Delivery of all operational and technology components enabling the successful new card launch, on schedule***
* ***Effective organisation (team working and delivery of high-quality documentation - Lord McLaurin, the then Chairman of Tesco, claimed that he had never worked with such a professional and committed group of people (being the NatWest team).***

Nov 1992 – Oct 1993 Project Management Infrastructure Renewal

Managing, and mentoring, a team of project managers responsible for the incremental delivery of the IT strategy, encompassing business and technology change to Streamline Card Services’ operational units including:

**Achievements included;**

* ***Creation of the Business case with financial and operational benefits***
* ***Implementation of the migrated (down-sized) mainframe transaction archival system to a client-server platform***
* ***Delivery of the project on time and to budget (£3M) with benefits exceeded projections (£3.6M p.a.).***
* ***Successful and effective delivery of Staff training.***

Aug 1990 – Jun 1991 Business Analysis Card Services

Analysing the functions and processes to enable the migration of a major UK card issuer to a new card Platform.

**Achievements included;**

* ***Creation of the data mapping specifications***
* ***Successful testing and acceptance of the migrated solution/service.***

Sept 1988 – Aug 1990 Project Management Card Services

Assisted in the launch and development of the Switch debit card scheme, involving the bilateral issuer and acquirer arrangements of the members. Development of both debit/credit merchant services and debit card issuing services using the Base 24 platform.

**Achievements included;**

* ***Delivered the Business Case for bespoke invoicing, statementing and debtors ledger for 120,000 NatWest Streamline merchants***
* ***Produced the requirements document***
* ***Managed the successful development and delivery of the technology solution and associated operational processes***
* ***Successfully run the live operation for 12months.***

Education and Qualifications

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| Management Consultancy | **1998** |

Associate of the Institute of Consulting and Certified Management Consultant (CMC) with the IMC [www.iconsulting.org.uk](http://www.iconsulting.org.uk)

Project Management

IS Development Process, Microsoft Project, Prince and Prince II project management courses, attained ISEB Project Management Practitioner qualification.

Internet/e-commerce

Intranet site visit to Cisco, Corporate Intranet Forum, Intranet Address Registration Authority Conference.

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| College of Further Education, Barry, South Glamorgan | **1977 – 1979** |

ONC in Business Studies, ‘A’ Levels in Accountancy and Economics

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| St John Fisher & Thomas Moore Secondary School, Colne, Lancs | **1971 – 1976** |

Six GCSE ‘O’ Levels

Personal

Based in Harrogate but available to work throughout the UK.

Interests:

* My wife and I have five children, one grandchild and enjoy supporting their interests and activities
* Enjoy going to the Gym and watching sport
* Keen on motorcycling and most forms of motor racing
* Qualified as a member of MENSA with an IQ of 149.