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PROFESSIONAL SUMMARY

An accomplished business and IT leader and management professional with over 25 years of experience and a strong **reputation for getting things done**. Experience with very large and small organizations with a **passion for customer service**. Known for **effective decision-making**, excellence in **coaching** and **building leaders**, business **process improvement** and delivering **high-value solutions** that achieve optimum organizational performance.

With demonstrated expertise in:

- Strategic and Operational Planning
- Human Resources Management
- Analysis and Problem Solving
- Relationship Building
- Process Analysis & Reengineering
- Facilitation
- Applying Technology to Enable Business
- Budgeting and Financial Reporting
- Research
- Project Management
- Business & Systems Analysis
- Software Development Lifecycle
- Human-Computer Interaction
- Business Architecture

ACHIEVEMENTS

- **Improved** the **organizational capability** of the Info-Tech Research Group Research area to support the growth of the company. Expanded the analyst group from 8 to over 30 analysts and defined several research business processes. This work allowed the group to remain effective and continue to provide excellent products and services through a period of very high personnel growth and organizational change.
- **Defined** and **implemented** the **vision, strategy and best practices** for the Technology Help & Support Process and Help Desk for London Life Insurance Company. Resulted in significant improvements in technology, practices and processes, capabilities and performance in supporting over 2500 technology users across the country.
- **Wrote** and **published** over 50 articles and reports, and **guided the overall research and writing agenda** for 20,000 Info-Tech clients. Improved topic coverage and professional coverage of several research areas for Info-Tech Research Group.
- Sought out as **Change Agent** to provide advice and counsel on **management of change practices**, and how to communicate effectively. Increased the management of change communication capabilities of several large Info-Tech Research Group clients.

- **Led and developed** the (business) systems analyst group at London Life Insurance Company as the practice leader. Group grew to over 40 analysts and became recognized in the larger IT organization covering Great West, Investors Group, Canada Life for as the experts in analysis best practices.
- As a **founding member** and volunteer for the **International Institute of Business Analysis (IIBA) led the creation** of the first edition of Body of Knowledge (BOK). Putting the BOK in place allowed for creation of the certification exam and was part of the reason IIBA has grown from 28 founding members to 14,000 members in 105 countries.
- **Developed and delivered management of change training** to the Info-Tech management team. The material was shared several times with external clients to support their management of change efforts.
- Acted as **Project Manager to lead several projects** within the transformation of the Info-Tech in-depth research process. Implemented a process to deliver practical and tactical, real-world enterprise customer experiences through rigorous and consolidated research and publishing; process has gone to market and is receiving extremely positive customer reviews.
- Acted as **Project Manager** to lead the development of the CoPilot software system that resulted in improved productivity for several hundred customer service staff across Canada, **800% ROI**, remarkable user buy-in and winning the **Conference Board of Canada's ITX (IT excellence) award**.
- **Created** a program and **delivered** curriculum for a leading Canadian financial company to grow leaders in their business/systems analysis group. The program was adopted as best practice and is still in use today.
- **Led the application architecture** for the 2001 Canada Summer Games. This was a volunteer position though was almost the equivalent of a full-time role. Delivered a logical object model for the Games business resulting in identification and implementation of reusable code components, saving scarce volunteer development time.
- **Developed curriculum and facilitated** at an in-house 12 week Object Oriented Immersion school for IT staff. Object Oriented became a part of the toolkit and culture of the development shop.
- **Created the IT Resource Deployment process** for London Life, Great West and Investors Group This resulted in the development of a **comprehensive map of the related IT processes, measurable standards and improved resource assignment** (time to resource and skill match) to projects.
- **Managed the Systems Analyst career center** at London Life including **strategic and tactical planning, creation of annual operational plans and management of a \$2M+ budget**.

PROFESSIONAL EXPERIENCE

Owner, Capability Insights Consulting, London ON 2010 - present

- Provides advice and consulting services to organizations to help them build their people, process, leadership and IT capabilities.

Member, IIBA Board of Directors 2010 - present

- IIBA® is the independent non-profit professional association serving the growing field of Business Analysis. The role of the Board of Directors is to ensure and assist the IIBA senior leadership team in meeting the mission and strategic goals of the organization.

Member, Board of Directors, Centre for Children & Families in the Justice System **2010 - present**

- The Centre for Children and Families in the Justice System (formerly the London Family Court Clinic) is a non-profit social service agency helping children and families involved with the justice system as victims of crime, witnesses of crime, parties in custody disputes, subjects of child protection proceedings, litigants in civil suits for compensation, teenagers in therapeutic care settings, or youthful offenders. We are known especially for our grounded approach to understanding and helping children exposed to domestic violence.

Info-Tech Research Group, London ON **2006-2010**
Director of Research 2008-2010

- Built and managed research delivery capabilities. This included the research processes, product management & people processes required to deliver on the vision of high value research for clients.
- Managed quality of research material and ensured proper coverage across the product set.
- Provided knowledge transfer & skill building to Senior Research Analysts. Responsible for the performance management and professional development of the Senior Research Analyst team.
- Member of the senior leadership team setting product vision, Research directions, and leading points of view. Drove process improvement initiatives for both Research as well as the organization at large.

Lead Research Analyst, Enterprise Applications 2006-2008

- Created high quality, timely, relevant and high impact research deliverables that imparted clear value to IT decision makers.
- Directed a research agenda followed by other analysts to create a meaningful, unique and valuable body of research.
- Consulted with clients to understand their situation, their questions and provide guidance on key issues/decisions. These included people and leadership issues, product trade-offs, purchases, technology directions, ROI/TCO and best practices.
- Built an effective team through proactively highlighting development objectives, active coaching/mentoring and knowledge transfer in all research activities.

Analyst Career Center Leader, London Life Insurance Company, London ON **2000-2005**

- Started the career centre; established the mission, vision and values; grew the centre to over 33 staff in two locations from a 11 member start-up; established member sharing and peer coaching recognized as a model for other career centers.
- Established a cross-site (London Life, Great West, Investors Group, Canada Life) analyst advisory group that established priorities and guided the operational plans, education and best practice work across the sites.
- Implemented the activities, deliverables and templates for the analysts within the application development methodology resulting in improved communication on cross-site projects (including needs analysis, functional and engineering requirements, business object modeling).
- Delivered gap analysis of all IS processes across the five company IT organization (London Life, Great West, Investors Group, Mackenzie Financial and Canada Life) for compliance with the federal Privacy legislation (PIPEDA) and managed the team closing the high-priority gaps.
- Executed a budget of \$2.5+ million dollars annually for the career centre.
- Executed all hiring, performance management and professional development for the career centre members.
- Managed relationships with several IT contracting vendors to support use of contract resources as required.

**International Institute of Business Analysis, Toronto ON 2004-present
(volunteer position)**

- From 2004 – 2006 as Chairperson for the Body Of Knowledge Committee, led a diverse group from across North America in the creation of the body of knowledge for IIBA (www.iiba.com). Also a member of the exam creation team.
- From 2006-2009 as a member of the core BOK Committee, reviewed updates to the BOK, created and updated the BOK Glossary.
- 2009 – present – member of the Certification Committee

**Instructor, Organizational Learning and Development, 2003-2004
Fanshawe College, London, ON**

- Developed course material and delivered course covering learning styles, individual/team/organizational learning theories.
- Developed and implemented course structure and populated course material into course web portal.

**Leader, Architecture and Development for the 2001 1998-2001
Canada Summer Games, London ON (volunteer position)**

- Developed overall application architecture that guided all Games software development (Volunteer, Sports Results, Accreditation etc).
- Created templates for analysis documentation allowing for a consistent approach and results from volunteer analysts.
- Implemented the web-based Volunteer Application resulting in over 80% of applications received on-line without the need for paper handling.
- Delivered a logical object model for the Games business resulting in identification and implementation of reusable code components, saving scarce volunteer development time.

London Life Insurance Company, London ON **1977-2001**
Application Architect and Lead Analyst 2000

- Delivered reusable application architecture design for a suite of applications resulting in IT standards for the 32bit development environment.
- Identified needed changes to field (advisor) management organizational structure and business processes that resulted in the recommended structure changes and savings in business processes execution supported by new software applications.
- Defined scope, analysis approach, issue process and developed the migration plan and worked with executive business management on a highly confidential, high priority business project that was delivered within the timeframe required.

Domain Leader, Advanced Learning Systems 1999

- Led the Advanced Learning Systems team through four multi-media projects that provided advanced online learning applications saving significant training and travel costs and that provided the sales force with automated coaching on the sales process.

IT Consulting Specialist 1996-1999

- Led the development and implementation of CoPilot system to improve effectiveness of Customer Service Assistants, resulting in 800% ROI, and winning the Conference Board of Canada's 1997 ITX award for technology innovation and excellence.
- Researched and implemented Usability Engineering best practices into development methodology resulting in improved application designs for user performance.
- Implemented cost-effective usability lab for usability testing.
- Identified and documented issues with the software distribution process and tools resulting in a several process improvements leading to reduced errors and cost.
- Created the IT Resource Deployment process for London Life, Great West, Investors Group resulting in measurable standards and improved resource assignment (time to resource and skills match) to projects.

Process Owner and Consultant 1993-1996

- Defined and implemented the vision and strategy for a Technology Help and Support process, including team structure, call center telephony technology and call management technology resulting in improved capability and performance in supporting over 2500 technology users.
- Led the definition and mapping of London Life Information Services Operations processes and consulted on implementation.
- Approved expenditures for Operations budget based on process improvement needs, covering all aspects of IT operational services.
- Managed relationships with numerous technology vendors to support technology infrastructure.

Systems Consultant and Developer 1986-1993

- Developed curriculum and instructed at an in-house 12 week Object Oriented Immersion school for IT staff resulting in increased capability in OO development and the development of a number of reusable objects.
- Implemented several expert systems that enabled London Life to improve customer service and achieve a 3:1 benefit payback.

Various business roles

1977-1986

- Held various and increasingly responsible positions, including supervisory experience in various business departments.
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EDUCATION

- Royal Roads University - Master of Arts • Leadership (2000)
- Fanshawe College – HR Management, Marketing and Computer Processing courses

DESIGNATIONS

- Certified Usability Analyst (Human Factors International)
- ITIL certification
- FLMI (Fellow, Life Management Institute)

MEMBERSHIPS

- IIBA (International Institute of Business Analysis)
 - ACM and ACM SIGCHI
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PUBLICATIONS

- Ongoing Blog at www.capabilityinsights.com
- Several articles, in-depth reports and research briefs on Info-Tech Research Group web site
- “2001 Canada Summer Games – Leaving a Legacy for 2003 and Beyond”, Royal Roads University, Publication # AAT MQ54583
- “Introducing Usability at London Life”, CHI97 Conference Proceedings

AWARDS

- 1997 ITX Award for Technology Excellence and Innovation awarded by CIO magazine and the Conference Board of Canada

SPEAKING ENGAGEMENTS (SAMPLE)

- “SOA in Healthcare” – in partnership with IBM, In Edmonton, Winnipeg and Toronto, Fall 2007
- “Blending Requirements and Usability Practices” – World Congress for Business Analysis, November 2006, Orlando
- “Demystifying the IIBA BOK” – Business Analyst World, May 2005, Toronto
- “What is Usability Engineering” – Business Analyst World, May 2004, Toronto
- “Use Cases 101” – Investors Group / Great West analyst conference, 2003
- “Requirements Management Overview” – Investors Group/ Great West analyst conference, 2002
- “Designing for Web Usability” – London Life Web Developers User Group, 1998

- “Useable Technology – putting users back in the pilot seat” - The Cutting Edge, Information Technology Best Practices Congress (hosted by Conference Board of Canada) 1998
- “Introducing Usability at London Life” - CHI '97, Atlanta
- “Usability Engineering” - CIPS, London 1997