

# DAVID ROSENTHAL

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## PORTFOLIO / PROGRAM MANAGER

EPMO • PORTFOLIO/PROGRAM MANAGEMENT • GOVERNANCE • STRATEGY • DEPLOYMENT

### SUMMARY

Senior PMO portfolio/program leader for global digital transformations in Entertainment, FinTech, Healthcare. Managed project portfolios of \$400M+. Managed technical information systems implementations and related administrative functions such as budgeting, finance, and personnel. Led OCM initiatives, B2B, B2B2C, B2C offerings for startups, early stage and fortune 100 companies. A strategy leader, fully versed in new product introductions, IT cloud migration & data transformations, MVP and go to market execution.

EPMO and CoE evangelist and creator. Enhanced delivery using proven frameworks, lean methods and SDLC/PDLC, best practices: ITSM (Agile-Kanban/Scrum & waterfall, CMMI, Lean/Six Sigma/DMAIC, DevOps CI/CD, ITIL, COBIT) PMBOK. Certified SAFe® 4 Scrum Master

Strong command of Office 365 and portfolio (PPM) tools: Jira, Confluence, Sharepoint, MS Teams, Clarity, Rally, MS Project Online, Planview, Jaggaer, Apptio, SAP Concur, ServiceNow, Adaptive Planning

Strategic business planner and analyst. Financial engineer and Excel guru in developing complex financial models and business cases for justifying major investments. Developed OKRs, KPIs, metrics, budgets and portfolio waterline. Crafted proposals, RFXs, NDAs, MSAs, SOWs. Calculated TCO, NPV/IRR/ROI, EVA, scenarios, cost/benefit and sensitivity analysis.

A high degree of diplomacy and emotional intelligence, with outstanding written, oral, and interactive communications skills.

Mentor and developer of staff, orchestrating multiple projects/workstreams, direct & indirect reports, working horizontally and vertically with domestic and off-shore resources.

Effectively packaged and confidently presented compelling value propositions to board members, C-suite and senior leadership on critical IT capabilities that supported objectives.

### EXPERIENCE

Blue Shield, Los Angeles, CA

06/2023 – Present

#### PROGRAM MANAGER, FINANCE CONTROLLER

Program Manager - PMO Finance Controller for a \$98M multi-year pharmacy care transformation program, with over 200 core team members and five major service providers (Abarca, CVS, Navitus/Cost Plus, Amazon Pharmacy, Prime) that will transform the end-to-end prescription drug ecosystem and save \$500M annually.

PMO FP&A lead: Automated reporting, streamlined process and published job aids for monthly, quarterly cycles for budget management, forecasting, variance analysis, executive dashboard and annual planning. Created MS Project Online template and IMP/IMS to manage 5 major workstreams and 12 cross functional product groups

Accounted for requisitions (Service Marketplace SMP / SNOW), accruals, reclasses, Oracle actuals (IBM/Apptio), tracked POs, SOWs (Jaggaer), invoices (SAP Concur), onboarded and managed resources (Planview), OKRs (AgilePlace).

Drove stakeholder relationships and funding approvals, budget management, OKRs, ongoing operational costs, 5 yr benefits projection, and financial analysis of global cross functional implementation teams (data integration, member experience, cloud services (Oracle ORMB, Azure, Snowflake), service provider implementation, 3<sup>rd</sup> party integration, information security, data analytics, finance applications, product code management.

Created an unbundled supply chain that provides quick payment and real-time claims, pricing transparency, alternative medications, specialty services, and manufacturer agreements. Implementing a transparent, multi-partner Cost Plus Pharmacy model via Oracle Revenue Management and Billing (ORMB) cloud service on Azure.

**Accenture, Los Angeles, CA**

01/2023 – 03/2023

**PROGRAM MANAGER**

Assigned to mature the EPMO tools and processes for the Control Center Modernization program at Sempra Energy. Managed 16 multi-year Control Room, Grid & Field Operation Transformation initiatives. Created an integrated master schedule (IMS) including Cloud vs. on-prem, cross-project dependencies and synchronization. Engaged stakeholders, defined KSFs/milestones/KPIs/OKRs, conducted training (governance, best-practices) for 16 project leads. Optimized PPM tool usage: Project Center / MS Project Online, Oracle Primavera P6

**AT&T, Los Angeles, CA**

11/2021 – 11/2022

**PROGRAM MANAGER, ITRAC, Network Analytics & Automation, Inventive Science**

**Product Feasibility / Discovery / Contracts:** Developed RFXs, SaaS product requirements and TCOs coupled with a multi-billion \$ strategic roadmap, business case and new revenue opportunities for multi-generational PaaS programs with multiple partners that will implement 1.) classical RAN to vRAN to O-RAN migration, 2.) a Common Event Data Bus (CEDB), and 3.) a holistic Service Management and Orchestration (SMO) platform over the next 6-8 years. Assessed multiple RAN virtualization, data processing, architecture, app framework, hybrid/Azure cloud options for merit and risk adjusted return on capital

**Wells Fargo, Charlotte, NC**

02/2020 – 11/2021

**STRATEGY CONSULTANT, Data Management & Insights (DMI), Enterprise Data Lake (EDL)**

Led several workstreams including: Risk Metrics development for SPARK data, market data migration, and implementation execution of legacy data and legacy clusters with Hadoop and the data lake for the Regulatory Data Management team (DMI)

**PROGRAM MANAGER, Consumer Lending Risk Management Strategy PMO**

Led the Enterprise Insights Strategy program for a new Centralized Control Data Mart (CCDM) – Led Regulatory Data Management and Insight team (DMI), ATOM team and seven workstreams involving all Consumer Lending business units (Card, Retail and Merchant Services, Home Lending, Personal Lending, Auto)

- Worked with executives to develop the roadmap, business case and multi-generational plan (MGP) for new capabilities to deliver self-serve capabilities and real-time insights
- Developed a Control Information Hub (GUI) to create new relationships among entities, create metadata, support self-serve reporting, dashboards, and advanced analytics
- Developed metrics and metadata for new Tableau Executive Dashboards and Reports
- Migrated data from multiple SORs to CCDM. Developed data refresh rates, movement controls, data quality rules (DMI), connection and usage agreements
- Led vendor integration of SAS Viya 3.5 platform/SAS Detection and Investigation for Banking software to the new Business Led Analytic Discovery Environment (BLADE)
- Implemented Advanced Analytics tools (Knowledge Studio, DataRobot) to support thematic analysis, key indicator trending, and cognitive analysis (AI, ML, NLP)

**Bank of America, Charlotte, NC**

12/2018 – 09/2019

**IT PROGRAM MANGER IV, Data Analytics Platform (DAP), Hadoop as a Service (Haas)**

Portfolio Manager for 80 projects, data center decom, infrastructure and cluster migrations, major upgrades (Cloudera CDH 6.2.1 and RHEL 7.x), numerous POCs, and Hadoop as a Service (Haas) platform (2,600 nodes, 55PB) enhancements managed on Cloudera.

- Established the PMO, created roadmap, executive dashboard, and automated reporting
  - Transformation lead - converted the department from a waterfall to SAFe (Kanban/Scrum) Agile mindset managed on Jira and Confluence
  - Created a business case and financial TCO to justify migrating burst CCAR workloads from on-prem Hadoop clusters (26,000 nodes, 85,000 cores, 55PB) to public cloud
  - Developed tools for: 1. resource management and skills inventory, 2. vendor contract management, SLA metrics & performance evaluation
  - Led the HaaS service catalog development, cost model for intake/onboarding of Risk, Fraud, and Consumer banking tenants migrating to shared enterprise Hadoop Platform
  - Developed hybrid chargeback model based on storage allocation, IT services, grid usage
  - Produced an interactive tutorial and video promoting our Hadoop As A Service platform
- Project Manager for:** 1. Cloudera upgrade from CDH 6.0 to 6.1 1, 2. Redhat RHEL upgrade from 6 to 7.X, 3. Zaloni enhanced data lake, 4. Trifacta data wrangler mini-cluster solution, 5. BlueData POC to assess Elastic Private Instance Cluster (EPIC) containerization

**Wells Fargo, Charlotte, NC**

11/2017 – 11/2018

**PROJECT MANAGER V, EIT PMO Center of Excellence, (PMOCoE)**

**Application Cloud Migration:** Led a global team of 80+ through a Modernization and Simplification program - a large-scale, multi-year cloud migration of 2000+ applications to private (on-premise) Pivotal Cloud Foundry (PCF) (PaaS), and public cloud (AWS, Azure). Led program governance, risks/issue management. Provided critical path and financial analysis, methodology guidance, schedule/on-time delivery and reporting

Supported multiple lines of business: Community Banking, Consumer Lending, Digital Channels Technology, Payments, Virtual Solutions and Innovation (PVSI), Wholesale, Wealth and Investment Management (WIM), Shared Services (HR, Finance, Risk, Security) etc.

**Project Manager: User Access and Application Enterprise Information Security Gating.**

Migrated Applications to PCF (PCI, High Dollar, Publicly Available, High/Med/Low Risk)

Oversaw security gating: first (FLoD) and second line of defense (SLoD), risk management, and audit (WFAS) coordination, application migration and modernization, secure dev/ops, infrastructure platform and operations, secure reference architectures, Product Vulnerability Assessments, controls testing, Host Intrusion Detection (HID), PEN testing

**Project Manager: Secure DevOps Controls and Standardization.** Automated testing and standardized the application pipeline process and numerous tool instances

**Disney Worldwide Services, Burbank, CA**

1/2014 – 7/2017

**PORTFOLIO LEAD, EPMO**

Responsible for \$460M CIO capital investment portfolio. Provided insight to Corporate Finance, and Business Partner senior management for a range of, CapEx and OpEx budgeting, service management, operations management and IT investment financial planning deliverables for all segments; Corporate, Consumer Products and Interactive, Parks and Resorts, Media Networks (ABC, ESPN), Studios (Disney, Pixar, LucasFilm).

- **PMO Governance and Leadership:** Established PMCoP (Project Management Community of Practice) for 100+ PMs. Reinforced best practices, managed change and enforced data quality in support of EPMO, Corp Finance and Accounting functions
- **Proposal Development:** Developed proposals for GEN 2 outsourcing (ATOS, HCL) vendor contract renewal and enterprise software licensing (Oracle, MSE). Leveraged licensing options and optimization strategies resulting in cost avoidance of \$400K

- **Business Cases:** Crafted business cases supporting complex make/buy/lease/outsource options. Tracked SLAs for vendor performance and internal metrics
- **Contracts (MSA, NDA, SOW):** Gained funding approval to leverage licensing options and optimization strategies resulting in significant cost avoidance
- **Services Broker Transformation:** Migrated from HP SM to ServiceNow (service-based cost model). Developed a new services (400+) catalog, pricing model, hierarchy, business capabilities, chargeback/recovery model
- **New Product:** Led new Adaptive Planning tool strategy, RFP and implementation – Defined data elements, new cost center hierarchy, chart of accounts. Managed connectivity to Clarity, Cognos, Apptio, SAP systems of record
- **AOP:** Contributed to annual operating plan (AOP) and five-year strategic planning
- **Feasibility, Simulation, Forecasting | Pricing:** Developed complex Excel models for DCF, ROI, depreciation simulation, asset performance, licensing, pricing & recovery.
- **Resource Planning:** Developed a mobile app (PowerBI/Sankey) to track headcount

**DirecTV, Inc., El Segundo, CA**

3/2013 – 10/2013

**SR. PROGRAM MANAGER, PMO**

Led central PMO in managing 100+ project managers and analysts and \$200M capital project portfolio. Assured data quality, standardization, and drove adoption and training for tools including Clarity (PPM), Cognos (budget tracking, variance analysis), Apptio (TCO)

**Project Manager: SDLC Risk Mitigation and DevOps Process Improvement.** Led project for 19 high-visibility B2C SaaS applications - customer facing billing, digital broadcast TV scheduling and programming. Enhanced CX and raised (NPS) Net Promoter Score 20 points

**EDUCATION**

University of Southern California, Marshall School of Business, Los Angeles, CA  
MBA, Finance (Investments concentration)

Rochester Institute of Technology, Rochester, NY  
BS, Mechanical Engineering

**PROFESSIONAL DEVELOPMENT**

SSM, Certified SAFe® 4 Scrum Master, Scaled Agile  
CSM, Certified ScrumMaster, Scrum Alliance  
PPA, Project Process Architecture™ , Center for Project Management  
Xerox Management Program