

DANIEL J. MONTGOMERY



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Summary

Dan Montgomery is a professional management consultant and executive coach who helps leaders and organizations improve planning, collaboration and business performance. He works with clients to translate vision and strategy into: practical, manageable plans; clear performance metrics; sustainable business models; and a high performance organizational culture.

He has an MBA from the University of Colorado, as well as a Masters in Psychology from Naropa University, in Boulder, Colorado. He is a veteran of major consulting firms including Accenture and Ernst & Young, and has been an independent consultant and coach since 2002.

Originally from the Pacific Northwest, Dan has lived in California, Washington, Colorado, Nebraska, Massachusetts, and Arizona, and spent 16 years living and working in Nova Scotia, Canada. He is a citizen of both the US and Canada. He currently resides just outside of beautiful Boulder, Colorado.

Industry Background

- Natural Products
- Financial services
- Economic development
- Electric utilities
- Telecommunications
- Technology companies
- Construction
- Government services
- Health care delivery
- Public corporations

Certifications

Balanced Scorecard Professional – 2009
Balanced Scorecard Institute, Cary, NC

Certificate, Coaching in Business – 2007
Newfield Network, Boulder, CO

Certificate, Coaching for Personal and Professional Mastery - 2006
Newfield Network, Boulder, CO

Certified Management Consultant – 1998
Institute of Management Consultants, Washington, DC

Certificate, Information Systems Professional - 1990
Canadian Information Processing Society, Toronto

Certified Systems Professional – 1990
Institute for Certification of Computer Professionals, Des Plaines, IL

Education

MBA (Dual Emphasis in Information Systems and Human Resources) - 1982
University of Colorado, Boulder, Colorado

Master of Arts, Buddhist and Western Psychology - 1978
Naropa University, Boulder, Colorado

Bachelor of Arts, Interdisciplinary Studies in Art, Social and Political Science- 1974
The Evergreen State College, Olympia, Washington

Representative Recent Consulting Projects

Team Coaching and Alignment

A fifteen-year old technology company was in the process of "re-startup" - developing a new market strategy that required significant changes in focus, work processes, and organizational culture. Dan and colleague Susan Skjei conducted an organizational culture assessment, provided the senior management team with feedback as well as individual and team coaching, and developed a strategy map and new performance metrics meant to provide focus on desired business outcomes.

Strategic Conversations

A Fortune 100 resource company had developed a knowledge management system, and created communities of practice around specific technical and engineering issues. Dan and colleague Sera Thompson helped the knowledge management team organize and conduct a series of meetings using World Café and Open Space tools that opened up the conversation, allowed for divergent points of view to emerge, and facilitated the development of action plans for improving the knowledge management system.

Simplifying and Clarifying Board Reporting

Under new management, a large credit union organization was undergoing a financial turnaround. There were concerns that the Board had been in the habit of "micro-managing", and the new CEO wanted a new Board reporting framework that respected Directors' need to know, kept Board meetings focused on strategic issues, and reinforced management's accountability for running the business day to day. Based on extensive interviews and workshops with Directors and management, Dan and partner Andy Cutten developed a Strategy Map which identified the strategic objectives requiring focus at the senior management level. This was presented to the Board at a planning retreat. In the end the Board selected five major issues which they believed required quarterly Board attention, and agreed to allow management to report on the others on an exception-only basis.

Developing and Selling a Multi-Stakeholder Business Plan

A University was seeking local buy in and federal funding for a new campus-based business incubator, designed to encourage rural economic development and creation of new environmentally-focused business. This required an understanding of the views, concerns and needs of a variety of stakeholders, including faculty, students, local and federal government, and economic development agencies. Dan developed a customized approach to this complex multi-stakeholder environment. Working with a team of associates, including three other management consultants and an architect, Dan met with each stakeholder group and identified what they wanted from, and what they could contribute to, this new facility. This was translated into a multi-stakeholder strategy map, which was in turn used to flesh out a detailed business plan and financial model that identified critical resources and activities required to satisfy the various

stakeholder groups. With the ability to demonstrate thorough planning and local stakeholder buy in, the university was successful in attracting federal seed funding for the project.

Planning for Rapid Growth

An up and coming developer of body scanning technology for the clothing industry was about to receive a significant infusion of equity capital, with the expectation that volume would increase exponentially. In order to make best use of the new capital, and ensure quality and sustainability, management needed a plan that would allow them to hit the ground running. Working with two associates, Dan developed an approach that involved: fleshing out a future state vision with the management team; identifying value relationships with suppliers, distributors and retailers; and building a strategy map. The strategy map was used as the basis for a detailed plan that addressed needs in the areas of IT architecture, work processes, staffing and organization. At the end of two weeks, the team delivered a report that outlined options, costs and timeframes for required investment and activities in these areas.

Post-Merger Integration

An integrated energy company acquired a smaller electric utility. Commencing immediately after approval of the deal by the SEC, Dan provided methodology, coaching and facilitation for a cross-functional team that identified needs for organizational change and major process improvements. Post-merger integration issues were compounded by the emergence of a highly critical performance-based regulatory regime in the state the acquiree operated in.

Dan used balanced scorecard strategy mapping as a basis for clarifying key financial and customer service objectives. These formed the criteria for identifying strategic process improvement initiatives, as well as organizational design objectives. This work resulted in the approval of three major process improvement initiatives, in the areas of performance measurement, electrical system planning, and resource scheduling. In addition, the Executive used the team's findings as a basis for creation of a new, more streamlined organizational structure.

Following the acceptance of these recommendations by the Executive, Dan designed and delivered a communications program for employees of the acquired company. A series of employee meetings included a presentation on changes in the US electric utility industry, new organizational initiatives recommended by the team, and an introduction to change management.

Previous Employment History

1998 - 2002 SENIOR MANAGER, BUSINESS ADVISORY SERVICES
Ernst & Young, Halifax, Nova Scotia

- Built a regional advisory practice focused on strategic planning, organizational effectiveness, performance management, and technology evaluation.
- Developed a cross-disciplinary marketing team to address professional service needs of emerging high-tech companies, including specialists in finance, tax, audit, IS assurance and consulting within the Halifax office.

1995 - 1997 VICE PRESIDENT, CLIENT AND CORPORATE SERVICES
Eastcan Geomatics, Halifax, Nova Scotia

- Managed all support functions, including finance, IT and HR.
- Responsible for proposals, client contracts and project delivery.
- Restructured organization and rationalized 25-person workforce.
- Completed ISO 9002 certification.

1992-1995 CONSULTING MANAGER
Andersen Consulting, Halifax, Nova Scotia

- Provided IT consulting and project management services, primarily to provincial government clients in the Atlantic Region.
- Specialized in user requirements, vendor selection, implementation planning and change management

1989 - 1991 MANAGER, DISTRIBUTED SYSTEMS
Central Guaranty Trust Company, Halifax, Nova Scotia

- Managed a team responsible for technical planning, design and Tier 2 support for all distributed retail banking and office automation systems in a 300+ branch network

1985 - 1988 MANAGER, MICROCOMPUTER CONSULTING SERVICES
Massachusetts General Hospital, Boston, Massachusetts

- Conducted efficiency studies and small systems implementations for hospital departments.
- Created and managed a team responsible for providing microcomputer-based application, vendor selection, and project management services to a large and varied community of physicians and hospital departments.

1983 - 1985 BUSINESS ANALYST
Bergan Mercy Hospital, Omaha, Nebraska

- Designed, coded and implemented software and administrative procedures for a variety of human resource applications, including performance appraisal, employee health and safety, compensation management, and training.
- Introduced the use of microcomputers into the hospital and developed microcomputer support services for the entire institution as part of a newly formed Information Center within the MIS Division.