

Ivy Sea
Consulting Practice Overview
for
Tom Tshontikidis

Ivy Sea, Inc.
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www.ivysea.com

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What you can expect when you decide to work with me:

My consulting expertise focuses on analysis, strategy, business and system process, and project management and facilitation across the organization. I gravitate towards operations, infrastructure and information technology groups, yet feel that every area of an organization and its individual workgroups are constantly challenged to create, implement and maintain efficient – and rewarding – ways of working.

In a nutshell – and this is what my clients say – I’m a strategist, project manager and sounding board with a solid understanding of systems and technology. What I bring to my work is the ability to:

- ❑ Ask effective probing questions
- ❑ Quickly assess, understand and come up to speed on a situation
- ❑ Communicate clearly with stakeholders (I effectively bridge across all groups)
- ❑ Capture and organize the required steps for completion
- ❑ Remain open to opportunities, knowing that plans must evolve as circumstances change
- ❑ Successfully execute a plan, and
- ❑ Document the whole process.

And along the way, I usually end up convincing others that:

- ❑ It’s really not as bad as it seems
- ❑ In fact, it’s pretty straightforward
- ❑ They are capable of accomplishing more than they thought, and
- ❑ Work *can* be enjoyable and satisfying.

My commitment to my clients:

If a project requires, I'm willing to commit to full-time consulting work. And once I commit, I follow through with an engagement to its mutually agreed-upon conclusion. If you need part time, or limited support, I'm happy to explore ways we can work together.

One key benefit of working with me is that I believe it's imperative that the client-consultant communication lines remain open and honest. During any project, I set up regular, formal check-in meetings to assess progress and satisfaction, and ensure that we identify and implement any necessary mid-course plans or corrections.

As a consultant from a small firm, my reputation is everything. I can't hide behind a marquee firm name, and wouldn't want to. That said, being honest from the outset is in my best interest. So as a result, I'll never knowingly over-commit myself, nor will I accept work that is beyond my scope. If I'm unable – for whatever reason – to provide support, I'll do my best to brainstorm possible solutions and refer colleagues better suited to get the job done.

Key productivity tools:

I come up to speed quickly on third-party and proprietary productivity applications and systems. And I use the following packages extensively:

- ❑ Microsoft Office, including Word, Excel, PowerPoint and Access
- ❑ Microsoft Visio
- ❑ Microsoft Project
- ❑ Microsoft Exchange Server and Outlook Client

I can provide a full technology proficiency listing upon request.

What others say about what it's like when we collaborate:

...when you have to get the job done and can't afford missteps:

“I only worked directly with Tom for a few months. Yet in that time he showed me a level of focus, clarity and productivity I hadn't before seen. Tom also showed an incredible ability to quickly pick up any required concept or technology. And not just what's needed to get by – he developed a level of competence that got the job done well. Our project was on an extremely tight deadline with a cap on available hours and our second consultant wasn't nearly productive enough. When the dust settled, Tom basically did the work of two people without working much overtime, allowing us to deliver on schedule and budget. His efficiency and effectiveness were so impressive that I actually asked him how many hours he slept each night! Imagine my surprise when he replied ‘at least eight.’ I just hope that the timing will be right for both of us so that we can work together again.”

--Ken Baba, Director of IT Operations, Robert Half International (www.rhi.com)

...when you want someone to take ownership, add real value and represent you well:

“Tom brings a fresh perspective to business and systems challenges, offering creative solutions that are geared towards simplicity and common sense. He then develops and implements processes and procedures that in hindsight seem obvious. He ensures that key stakeholders remain informed; I never have to wonder where things stand. In fact, Tom's work at FHLB required him to interact with most, if not all, of our department, as well as a fair number of Bank staff. His manner facilitated good communication, which resulted in a high level of respect that allowed him to be very effective.”

--Patti Carney, Manager, IT Operations and Admin; Federal Home Loan Bank of San Francisco (www.fhlbsf.com)

...when you're stuck, or have otherwise lost sight of the goal and need to get back on track:

“Tom’s gift is his ability to help others be effective, and get grounded in their decisions and actions. His thoughtful questions, deep listening and knack for unearthing a situation’s core issues result in a vision that’s on-target, refined plans that have appropriate next steps, and a renewed confidence that is oftentimes lacking. His calming manner and pragmatic approach put anyone at ease instantly. Tom is the first person I think of when either I or a colleague need a project partner or just an occasional reality check.”

--*Patty Mikinka, Data Architect and Project Manager, Robert Half International (www.rhi.com)*

...what peers say:

“Integrity is the hallmark of Tom's professional performance and contribution. He remains clear-sighted and focused through his intention of delivery, and he brings a remarkable depth of perception and talent to all his endeavors. I value Tom's expertise through his ingenuity, inspiration, clarity, thoughtfulness, and ability to translate theory into meaningful business processes and best-practice solutions.”

--*Marty Fuller, Senior Leadership and Management Consultant*

“As an IT professional for over 25 years, I have worked with many consultants. Tom stands out as the ‘consultant’s consultant,’ one with an outstanding work ethic. Through attentive listening, creativity and integrity, Tom identifies goals, develops start-to-finish strategies, analyzes processes and assesses priorities to a realistic and practical solution, all the while addressing business needs.”

--*Penny Szukalski, Senior Systems Analyst and Project Manager*

...finally, when supporting a client on behalf of a third party:

“My ideal consultant represents our firm professionally, delivers as promised, keeps everyone informed and looks for new ways to help our client be more successful. Tom did all this and more. His one-month engagement turned into more than two years, as our client themselves looked for new ways to keep him onboard. At SIS, we never felt out of the loop; Tom’s periodic updates not only discussed his work, he also shared how we might be of additional service on site.”

--*Paul Ybarbo, Account Manager; Systems Integration Solutions, Inc. (www.sisinc.com)*

Resume - A more detailed experience presentation:

Ivy Sea, Inc., San Francisco, CA - www.ivysea.com

Co-Owner and Chief Financial Officer - 11/1995 to Present

Perform billable consulting services, all in-house finance, operations and systems management, as well as corporate officer duties for our "small size, big impact" organizational consulting firm. We work with local, national and international organizations to help foster new levels of inspiration and effectiveness in organizational leadership, culture and communication. We provide strategic counsel, research, writing support, project-management, and vision and brainstorming program facilitation. My individual consulting expertise focuses on analysis, strategy, business and system process, and project management and facilitation across the organization. Specific areas of competence are operations, infrastructure and information technology.

In-house, my systems role includes all aspects of vendor relations, purchasing, implementation and maintenance of data and telecommunication technology. Specifically: servers and workstations, local and remote networking, desktop and network operating systems, applications, printers and peripherals, web-based activity and commerce, and all wired and wireless voice systems. My operations role includes internal business-process creation and maintenance, facilities management, contract negotiation, purchasing and legal. And I manage all finance and accounting from strategic planning and forecasting to day-to-day processing and management.

In 2001, we launched Ivy Sea founder Jamie Walters' book *Big Vision, Small Business* (www.ivysea.com/pages/BVSB.html) in hardcover under Ivy Sea Publishing – our first formal print release. Established sales and distribution channels, set discount structure, and manage all fulfillment and sales tracking.

Recent full-time consulting engagement information:

Federal Home Loan Bank, San Francisco, CA - 10/1998 to 12/2000 (www.fhlbsf.com)

(Individual projects presented in reverse chronological order.)

IT Leadership/Change Consultant; IT Project Manager - 6/1999 to 12/2000

Provided strategic counsel and support as IS Operations AVP consolidated her group with IS Technical Services. Counseled team managers regarding planning, communication and process. Created short, mid-range and long-term milestones for behavior and culture change, and staffing.

Met regularly with AVP to check in, provide brainstorming support, act as a sounding board and provide unbiased feedback.

Created a department-wide project plan template and process to consolidate all plans for IS management. Implemented pilot project integration for Technical Services group. Rollout to department was scheduled for 2001. Led CIO-sponsored meetings to articulate plan and get buy-in from IS leadership. Maintained and communicated department-wide view of all projects, resources, and dependencies in the interim.

Prepared and helped justify 2001 IS department project-related budget. Met extensively with CIO, AVPs and Controller during process.

Researched, documented, prepared and presented a proposal for the feasibility of both implementing an enterprise scheduler (to replace several standalone, platform-specific scheduling PCs) and creating a more formal QA environment. Proposal recommendations were approved by the budget committee.

For the enterprise scheduler, researched/evaluated compatible products, consolidated all Bank processes/job flows, drafted product requirements and worked with staff DBA to conduct preliminary test of finalist software (Redwood JCS). For the QA process, conducted staff interviews, reviewed then current QA process (procedural requirements, available test infrastructure, licensing, etc.), researched QA products and processes, and recommended QA/change control process flow. Consolidated this information, drafted a proposal, briefed leadership and created phase 1 project plans.

Y2K Business Resumption Coordinator - 6/1999 to 9/1999

After finishing my last integrated testing partition, I supported the Bank's Business Resumption testing. Although it relied on specific systems technology, this test focused more on the Bank's ability to accomplish vital business processes off-site.

Provided leadership, oversight and process identification/facilitation to move business units through preparation and testing of contingency plans for mission-critical business functions. Created test environment scenarios and processes to exercise contingency plans, allowing auditors to review test results. Led business groups through dress rehearsal and formal, off-site test.

Y2K Integrated Testing Coordinator - 1/1999 to 5/1999

My engagement was extended to coordinate three integrated testing "partitions" (due to my understanding of the Bank's technical environment, and my ability to interact with both business units and IS staff members). Each partition comprised anywhere from seven to twenty related system interfaces where data flowed from one application/system to another. The goal was to capture all date-related functions not tested in unit testing (generally a manual or system-specific process), and to exercise all automated batch processing (Unix cron, proprietary Unix-based scheduling application, Win AT, Cron Jr.). For each partition we tested two accelerated scenarios: 12/31/1999 to 1/2/2000 and 2/28/2000 to 3/1/2000 each over three 24-hour days.

Provided the sole leadership, oversight and process identification/facilitation for each partition. Organized, prepared for, facilitated and followed up on all partition team meetings (kick-off, periodic, dry rehearsal, dress rehearsal). Worked closely with application developers to ensure their interface documents were complete (interface description, process flow, functions represented, system dependencies, technical requirements, data requirements, database "warping" needs, test scripts, etc.). Resolved disputes regarding test waivers. Brokered conversations between business users and developers to ensure that test script actions corresponded with appropriate data validation. Created a "meta-script" that included each interface's test scripts taking event times into consideration, and streamlined this script to run over our abbreviated three-day timeframes (advancing the LAN system time/date when appropriate). Led all partition test windows, including testers, support staff, test LAN and server room. Consolidated all pertinent information, including test results, into a complete partition binder for regulatory archiving. Acted as Y2K LAN administrator to increase process efficiency: started and stopped Oracle databases, added Novell and Windows NT user accounts, changed LAN system dates/times, ran batch jobs, etc.

Y2K 3rd Party Application Compliance Tester - 10/1998 to 12/1998

Initially brought on board for one, possibly two months to research, document, test and follow up with auditors regarding various 3rd party applications for Y2K compliance.

Gathered information from vendors, interviewed key staff members as to use/date-related functionality and interaction with other applications, documented results (using Bank standard test document), created detailed test scripts, and conducted tests against several system dates. Although short-staffed, met all testing deadlines even with an aggressive deliverable schedule. A partial list of applications I personally completed follows:

- ❑ ARCServe 6.1/ARCServe 6.5 NT
- ❑ Clipper 5.2
- ❑ Cron Jr. 2.55
- ❑ Exchange 5.5/Outlook 97
- ❑ Fax Sr. 2.6
- ❑ InocuLAN and InoculateIT 4.5
- ❑ Office 97 (Word, Excel, Access)
- ❑ OnNet Host Suite 4.0-Telnet & FTP
- ❑ Pc ANYWHERE 8.02
- ❑ PKZip 2.6
- ❑ PowerDesigner 6.0
- ❑ Procomm 4.6
- ❑ PVCS Version Manager 5.3
- ❑ VirusScan 4.03a
- ❑ Visual Basic 5.0

Resume - Employment history listing and education:

Ivy Sea, Inc., San Francisco, CA

Co-Owner and Chief Financial Officer, 11/1995 to Present

See description above.

Systems Integration Solutions, Inc., San Francisco, CA

Technical Recruiter, 11/1994 to 10/1995

Placed professional consultants with Bay Area firms.

Brandon Systems, Inc., Oakland, CA

Technical Recruiter, 10/1992 to 10/1994

Placed professional consultants with Bay Area firms.

US Navy, California and Virginia, 6/1985 to 9/1992

Surface Warfare Officer, Lieutenant Commander

Held various posts throughout active duty and reserve career. Attached to USS Gray (FF-1054) as Deck Officer and Assistant Engineering Officer. Recruited for the Navy's Nuclear Power, Civil Engineering and other technical officer programs throughout Virginia. Held Training Officer position while attached to ASW Forces Pacific reserve unit that supported an active duty contingent in Pearl Harbor, HI.

Education:

- ❑ BA, Biology, University of Rochester, Rochester, NY 1985 (www.rochester.edu)
- ❑ Coursework in telecommunications and database management, UC Berkeley Extension
- ❑ US Navy Shipboard Officer School, Steam Propulsion Engineering School, Recruiting and Sales Training
- ❑ Various public workshops on change management and business communication

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