

Professional Profile

- Executive with experience in leading teams on large, innovative strategically important projects and complex strategies to meet business objectives.
- Skilled and trained in strategy formulation, communication, measurement and execution.
- Emotionally intelligent collaborator with the skill to develop strong internal and external business relationships, and experience using collaborative influence.
- Excellent leadership skills, strong team builder, able to communicate confidently and effectively.
- Strongly results oriented, ability to maintain a strategic perspective while executing through teams.
- Highly financially literate, externally aware with macro level and integrated thought leadership with specific outcomes intended to achieve business results.
- Dynamic and engaging public speaker.

Relevant Skills

- High quality strategic management experience including strategy formulation, business planning, monitoring execution, and alignment of teams, information and decisions for delivery.
- Sales leadership, sales team support, administration and management.
- Product lifecycle management.
- Creating processes, implementing and monitoring.
- Exceptional at evaluating and leading competition and business impact analysis, generating and designing reports, developing business cases, conducting cost benefit analysis, making recommendations and presenting information to fellow executives.
- Excellent project management skills including-out-of-the box thinking, strategic prioritization of work and problems, and professional communication for united acceptance of solutions.
- Ability to effectively handle multiple projects at once, function well in high-stress situations, work easily with diverse people and motivate and engage individuals.
- Excellent ability to conceptualize and practically apply technology to business, in business terms, for the purpose of creating business value.
- Creating and delivering meaningful change management and communications to both management and staff, ability to create buy-in at all levels of the organization.
- Eager and excited to continue to learn and experience new challenges.

Work History

Senior Vice President, Sales & Professional Services

Opta Information Intelligence

2017 – Present

- Plan, lead and create an industry best class revenue generating sales and professional services delivery team at OPTA. Sell, negotiate and close sales as required.
- Accountable for company revenue budgets, forecasts and board reporting. Lead corporate Sales strategy with the sales team.
- Create, implement, monitor sales KPI's, opportunity management pipeline tools and processes.
- Identify and support the development of multi-line sales channels, act as a technical consultant to the sales team to help close sales.
- Plan, lead, deliver and ensure successful customer implementations (internal and external). Leverage company assets, capabilities and resources to meet customer expectations.
- Lead, monitor, price and influence product enhancements and roadmaps to changing customer demands and future products and sales.
- Serve as a thought leader/partner within and outside the company, gaining and maintaining the respect of senior business leaders internally and externally.
- Manage, negotiate and nurture customer, partner and supplier relationships.
- Participate and help drive long-term strategic planning related to the organization's sustainability, revenue and EBIDTA targets while fostering an environment of high performance. Includes regular financial reporting, planning and analysis.

Vice President, Analytics and R&D

Opta Information Intelligence

2015 - 2017

- Lead a team of analytics, data and business analysts and experts on a mission to research, discover, invent, develop and productionize advanced analytics solutions that help our customers to achieve their business goals.
- Lead the discovery of new sources of data that enhance and improve our information products, assess, through experimentation and modeling, the value of the data.
- Demonstrate and maintain in-depth knowledge of business success drivers and differentiators, P&C insurance industry trends, and the competitive marketplace.
- Lead and manage the team(s) fulfillment of customer purchases for analytical products and services.
- Work closely with Opta's senior sales executive educating and supporting both them and our customers during the sales cycle. Educate other executives on the value of and market need for business leading analytical models and solutions.

Vice President, Production Solutions and Operations

Opta Information Intelligence

2012 - 2017

- Accountable and responsible to build, design and implement new processes and teams to support customer fulfillment and efficient solutions for products, automating where possible.
- Drive and manage product lifecycle management including feedback from customers, new innovative ways and markets for existing product set and balance resource allocation based on revenue/EBITDA.
- Search out, manage and negotiate with vendors/partners to acquire data on mutually beneficial terms. Manage data partners chosen as analytical data suppliers. Align contracts to match product lifecycle stage and monitor quality of deliverables.
- Lead with an execution mindset. Be driven to accomplish current goals while continuously building and investing for the future.

Director, Personal Lines Systems

Economical Insurance Group

2012

- Responsible for the effective and efficient delivery of personal lines products and services to market nationally.
- Responsible for definition of SBU strategy business model and required national re-structure proposal to align operations and supporting services to strategy and reduce operating expenses.
- Accountable for SBU strategy governance and monitoring of execution against plan. Facilitate bi-monthly SBU steering committee meetings, Operations productivity meetings and annual strategy day with Operations leadership. Created SBU dashboard and key metrics to analytically use and monitor.
- Created 5 year integrated roadmap and business proposal to combine portfolio of projects to achieve corporate financial targets and objectives.
- Lead national process improvement initiative to develop standards across Canada with 12 branches. Working with field leadership collaboratively implemented best practices and set benchmark targets and metrics.
- Created department mandate and vision using modern change management techniques and aligned performance management and career development and progression paths.
- Facilitate and drive new customer centric strategy including structuring pilot to test and validate business benefits for larger corporate transformation.
- Board of Director of IT startup specializing in industry integration solutions since 2008.

Director of Business Services and Architecture

Economical Insurance Group

2009 - 2011

- Responsible for the development and leadership of a new area in IT designed to deliver tangible business results through relevant business technology opportunities.
- Seeking and identifying potential opportunities through research and investigative implementation of solutions with an aim to understanding business value including appropriate fit to SBU & Corporate strategy, improved competitiveness in the market and

proposed implementation options and objectives. Responsible for and facilitating the department model of "innovation that matters".

- Aid and support the facilitation of an operational strategy definition by creating a high degree of commitment from executive and C-level to the board-agreed high level strategy and helping lead the translation of the strategy into clear execution understanding and priorities.
- Key liaison and trusted business advisor to subsidiary executive teams on the business of technology related topics including 'right sizing' for the company's size.
- Key member of department leadership team to collaboratively align department goals to SBU and Corporate strategies, identify actionable targets for the department and new capabilities required to improve delivery and alignment. Restructuring and leading architecture with a solid business perspective.

Program Manager Economical Insurance Group 2008

- Lead, formulated, internally sold and executed one of the company's most important, strategically external facing initiatives designed to integrate distribution partners (brokers) with internal business processes and technology.
- Integrated cross-functional line of business prioritization with external market information to ensure the program is highly responsive and market driven. This includes developing and negotiating key relationships with external vendors.
- Managed the \$6 million execution of four streams of project delivery of various size, complexity and markets, including inter-dependencies, program level solutions with re-use and integration with enterprise and solution architecture.
- Responsible for investigation, preparation and summarizing potential sources of solution of various application and IT solutions to integrate to internal business customers.
- Designed and articulated the company's operational strategy map including presentations and communicating to regions across Canada.

Initiative Manager Economical Insurance Group 2002 - 2007

- Achieved business objectives in a strategically significant IT initiative by building and leading project teams that have a clear understanding of business needs and are highly motivated to achieve success as individuals and as a group.
- Ensured that targets were met by determining the root cause of any unexpected obstacles and taking well-planned actions to overcome these without compromising the end objective.
- Proactively managed for successful delivery by identifying potential future risks and worked closely with executives and stakeholders to implement actions that effectively reduced the likely of their occurrence and their impact on achieving objectives.
- Designed and implemented new methods and models that successfully projected and tracked progress on meeting exit criteria that was specifically defined to achieve business objectives.
- Designed and implemented a methodology for assessing and reporting on the level of quality of the new applications throughout its development and upon its implementation. This has now become a company standard.
- Led the successful implementation of the new application and supporting processes by defining and implementing strategies to manage the introduction of change to the organization with a critical focus on achieving business value.
- Built and maintained executive sponsor involvement and support through continuous, open communication and clear, accurate reporting of progress and issues.

Project Manager

Economical Insurance Group

- Successful manager of large IT project laying initiative foundations, bringing together various business objectives to facilitate business scope, obtaining executive approval, task definition, resource planning, managing critical path, budget planning and reconciliation and vendor negotiations. Effectively prioritize work and problems for resolution.
- Communicate and liaison with business areas for understanding of business objectives, impacts and appropriate action plans.

Business Specialist

DWL Incorporated

2001 – 2002

- Lead role is US\$165 million project consisting of seven vendors with a large scope at the seventh largest property and casualty insurance company in the United States.
- Participation in meetings, as client advocate, to help communicate and discuss clients business requirements with other vendors.
- Opportunity to learn and understand the USA property and casualty marketplace.

Head Office (Business) Analyst

Gore Mutual Insurance

1998 – 2001

- Responsible for business requirements analysis, documentation, leadership of business tasks and management, development and execution of projects.
- Successfully completed some of the largest projects undertaken by the company to revolutionize underwriting with complicated scope and dynamic relationships.
- Successfully implemented the company Underwriting EDI system, including main support contact for branch and broker users.
- Help create and identify requirements for broker help cards.
- High quality personal lines underwriting experience in auto and habitational lines, portfolio and broker management and various broker incentive programs.

Education

Masters of Business Administration

Wilfrid Laurier University, Waterloo, Ontario

Major in Accounting

Certified Professional Accountant

Certified Management Accountant Canada, Toronto, Ontario

Bachelors of Arts

Wilfrid Laurier University, Waterloo, Ontario

Double Major; Economics and Psychology

Professional Development

- Fellow Chartered Insurance Professional (FCIP) accreditation.
- Chartered Insurance Professional (CIP) accreditation.
- Canadian Risk Management (CRM) accreditation.
- Wilfrid Laurier Alumni of the 2010 year for CMA/MBA
- Published in Risk Management and Insurance Review Vol 13, Spring 2010 for “First-Party Versus Third-Party Compensation for Automobile Accidents: Evidence from Canada”.
- Completed required 4500 hours of project experience for Project Management Professional (PMP) designation. Qualified to write the exam.
- Adjunct Professor at Wilfrid Laurier University 3rd year business course teaching Introduction Insurance and Risk Management.
- Past Board member for Waterloo Ringette.
- Past Special Committee Member Ringette Ontario Audit and Risk Committee.

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References

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