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SUMMARY : Over fifteen years experience primarily as a manager and consultant in information and telecommunication systems, with special focus on financial services industry. Strong management and technical skills on “break through” projects aligning business needs to technologies to increase competitiveness, boost performance, and reduce costs.

Wonk New Media DIRECTOR - Startup firm to direct-market multimedia software & services

1995 - present Web site development & hosting services for commercial and non-profit enterprises.

“Boot-strapping ” new enterprises to direct market and publish multimedia software using World Wide Web (WWW).

HMG, Inc. Independent Consulting

1994 - present *New Business Development* - Strategic planning, brand development, financing, marketing, distribution and production for start up firm developing environmentally safe cleaning products, as well as carpet all natural carpet and upholstery cleaning services.

Financial Services - Assisted First Union National Bank in its evaluation of financial marketing workstations and other customer Service technologies, Explored options for developing connectivity between 'back end' production systems and client workstations.

Information Technology - Designed CIO symposium on new user interfaces for mainstream business applications for Cambridge Technologies Partners to build client relationships.

Telecommunications - Research new distribution channels for (ISDN) networking device.

Commonwealth of Massachusetts DIRECTOR - Systems Integration Bureau
Office of Management Information Systems (OMIS)

1992 - 1993 Responsible for introducing new technology, including client/server, CASE and relational databases, to a traditional data processing organization which depended largely on 1970's technology and practices.

Directed re-engineering and development efforts for PARIS (Personnel Administrative Reporting Information System), \$2.4 million annual budget.

Managed multi-million dollar projects providing design and implementation support to a large scale Information Technology effort to reengineer most of the Commonwealth's statewide systems, supported by a \$100 Million plus bond bill.

Created “Open” access to enterprise information stored in mainframe systems (e.g. through the use of middleware) to both “empower” information owners and get “the data out of jail” for the Commonwealth's managers.

Directed over thirty systems professionals of Office of Systems Integration in introducing new technologies to state government by pioneering the application new techniques and tools.

Fidelity Investments PRODUCT MANAGER & STRATEGIC SYSTEMS CONSULTANT - Retail Marketing

1989 - 1991 Product Manager for the *PC-based on-line brokerage system*. Conceived, designed and supervised marketing strategy and technical direction for *Financial Advisors Workstation* (FAWS), targeted to “high end” investment advisor .

Designed, developed and managed *Fidelity Investments Customer Information Server* (FICIS). Provides information from Fidelity's production information systems directly to distributed customer applications, using client server architecture. Draws information from 20+ production systems in three cities, and to customers through PC, fax machine and automated voice systems.

Arthur D. Little MANAGEMENT CONSULTANT - Information & Telecommunication Systems

1988 -1989 Managed case advising on conversion from single site database, operations, and data processing architecture to a dual (3090) site distributed architecture for 650 branch Brazilian bank. Achieved excellent technical solution to strategic banking challenges.

Designed and developed "state of the art" office automation system and 1,000 plus workstation local area network for new headquarters campus facilities of major international bank in Jeddah, Saudi Arabia. Resulted in complete office automation design, reports and analysis, blueprints, and bidding specifications.

Worked on analysis of NY Stock Exchange capacity to deal with "crash" volumes without failure.

Bankers Trust VICE PRESIDENT - Credit Policy

1987-1988 Managed development and operation of the *RAROC Facility System*, global portfolio management system for all credit assets of the bank's \$50 plus billion asset portfolio. RAROC (Risk Adjusted Return On Capital) is Bankers Trust's risk evaluation methodology, similar reserve requirement techniques later adopted by Federal Reserve and FDIC.

Coordinated development of mainframe portion of \$1 million plus system which collects information from all operational credit and MIS systems of the bank for RAROC.

Implemented reporting and inquiry of RAROC databases on the mainframe, on workstation local area network: using a fourth generation language, and an executive information system.

Arthur Young MANAGEMENT CONSULTANT - Information Technology

1983-1987 Design and development work on primary on-line brokerage system for major investment bank, using ADABAS and NATURAL in an IBM mainframe environment.

Designed and supervised Systems and User Acceptance Testing process of microcomputer based Store Manager's Business System for large chain of stores.

Coordinated operational review of technical services (e.g. CICS, MVS, IMS, etc.) for "Fortune 100" MIS Department which untangled a system software environment nightmare.

**New Hampshire
Office of State Planning** PLANNER/MODELER - Economic Development

1979 - 1981 Major activities focused on economic research and planning for executive branch of state government. Including: Municipal finance database and analysis programs; Computerized models and grants tracking program; Programs for fiscal impact of tax exempt property for special legislative committee.

**Harmer Steel
Products** VICE PRESIDENT - Operations

1978 - 1979 Revived family specialty steel business dealing in rail and craneway materials. Developed and implemented marketing strategy; bought out principal competitor; reduced large inventory; produced first catalog, returned to healthy profitability.

Education:

- 1977 BA Economics and History
The Evergreen State College, Olympia, WA
- 1983 MS Computer and Information Systems
Dartmouth College, Hanover, NH
[Hybrid degree combined MS Computer Science with MBA]
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Technical Background:

- Extensive marketing and technical design, development, and implementation work on applications over the World Wide Web / Internet / e-commerce.
- Client / Server design, evaluation and implementation of software and hardware for distributed data processing, local area networks, wide area networks, telecommunications, imaging, public data networks, TCP/IP, SNA, X.25.
- Experience in database design, administration and tuning using many different database management systems (DBMS).
- Information systems planning, building new application development environments, software analysis, design, development, testing, implementation and operation.
- Consulting for systems on Financial Services for many commercial banking, investment banking, brokerage, mutual fund, and operations clients.
- Using IBM, Unisys and Honeywell mainframes; AT&T, STRATUS, TANDEM and Hewlett Packard minicomputers; and IBM, Apple, Compaq, Dell, and many other personal computers.
- Detailed microcomputer hardware and software experience predating development of IBM PC, including working in Arthur Young's National Office Microcomputer Technology Group from 1983 to 1984, and involvement in Dartmouth's campus wide networking and Macintosh strategy (1981-83) and Arthur Young's firm wide implementation of Macintosh Audit systems.
- Extensive experience with PL/1, NATURAL, MS/Windows, Visual BASIC, FOCUS, PASCAL, MS-DOS, BASIC, C, UNIX, Macintosh development and JCL; operating environments include NATURAL, ADABAS, DB2, MVS, CICS, COMPLETE, VOS, WIN32 and NT.