

RESUME FOR PMP CERTIFICATION APPLICATIONS

Education

Universidade de São Paulo – Escola Politécnica - USP – (1978 – 1982)
Av. Prof. Almeida Prado, 531 – Cidade Universitária – São Paulo – SP – 05508-900
Course: Production Engineering

Escola de Administração de Empresas de São Paulo - Fundação Getúlio Vargas – (1982 – 1987)
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Course: Business Administration – FGV ID # : 22148-2

Post Graduation: Diploma in Telecommunications - MBA – London University - (19869 – 1988)

Post Graduation: Project Management (USP – 1999 – 2001)
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Project 1 – IAF/IAC Suppliers Performance (Metrics) – Business Process Manager

(General Motors do Brasil Ltda.)

June 1999 – June 2000 - approx. 560 hours

As Manager, led the Business Process Redesign involving more than 400 suppliers around different cities and combining cultures from these suppliers in order to define an effective system to measure their performance related with materials delivered into General Motors sites in Brazil.

The results were total and integrated electronic communication with all suppliers with realigned processes and functions get effective performance improvement. Led cross-functional team from kickoff meeting to pilot deployment of internal help desk in less than 08 weeks. Then performed a project performance review on pilot and worked out issues over several months. From results of this new system-tool, developed with functional manager and their teams to realign functions, we have a much better communication and services from suppliers with a cost reduction (45% minus of re-work) through all local GM sites.

Initiating Process - approx. 80 hours

- Initiation — Identified as manager by sponsor, and defined roles and responsibilities with three functional managers.

Planning Process - approx. 160 hours

- *Scope Planning* — With team and sponsor, developed scope statement for establish the all areas involved and complete deliverables for each one;
- *Scope Definition* — With team and three functional managers, subdivided major deliverables including Business Processes Redesign processes for teams based on existing organizational processes, job functions for three teams, relationship management with Value Added Network defining their Roles & Responsibilities plus contractual penalties;

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- *Activity Definition* — With Functional and Technical plus Value Added Network Team, identified activities;
- *Activity Sequencing* — With Functional and Technical plus Value Added Network Team, identified and documented inter-activity dependencies not just internally but between our teams and suppliers too.

Executing Process - approx. 80 hours

- *Project Plan Execution* — Worked with teams from all areas involved to guarantee that project plan was performed in accordance with baseline established;
- *Scope Verification* — Worked with the Functional Managers and stakeholders during the fortnightly Project Status Report Meeting;
- *Quality Assurance* — Not applicable;
- *Team Development* — Worked with teams as requested offering recommendations to project leads;
- *Information Distribution* — Were established routine to provide for all teams a standardized information retrieval system and information distribution system if needed;
- *Solicitation* — It was stretched with Purchase Team during this phase;
- *Source Selection* — Not applicable;
- *Contract Administration* — It was coordinated together Purchase Team and myself in order to meet the contractual requirements. The main concern here was with security and contingency plan linked with penalties.

Controlling Process - approx. 160 hours

- *Overall Change Control* —The Program Office had a change control process and escalation process that was used when necessary with program leads, documenting, verifying, so implementation Baseline Change Requests were defined and spread out to all impacted areas;
- *Scope Change Control* —The scope control was part of the overall change control process;
- *Cost Control* — It was supported by Finance area and in accordance with deliverables established together the functional managers;
- *Quality Control* —The teams were responsible for quality control. Several teams had weekly quality control measurements and procedures;
- *Performance Reporting* — Joint MIS – Management Information Systems (see Scope Verification) status updated and meeting held every 4 weeks. Responsible for updating status of teams and rotate as facilitator of status meeting. Also involved in Operational Review all teams every 2 weeks when functional management was updated and information documented in project plan;
- *Risk Response Control* — Not applicable.

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Closing Process - approx. 80 hours

- *Administrative Closure* — A sponsor review meeting was done before to go over with other. A robust report with the lessons learned during the project was made to the Management/stakeholders with recommendations for improving the overall project management system in the organization with a strong executive summary;
- *Customer Feedback* — A table with the intermediate major deliverable was presented to the main impacted areas – internal clients – in order to evaluate the project;
- *Steering Committee Presentation* – An overall of project with the lessons learned was pointed out to the Top Management focused on the processes related on: How well did the team members work together? Did the team achieve the performing stage of team development? How come? Were the team meetings productive? A robust comparison between the baseline and the results was presented too;

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Project 2- EDIFACT – Suppliers Communication Process – Project Manager

(General Motors do Brasil Ltda)

January 1999 - December 1999 - approx. 1,920 hours

As Project Manager in EDIFACT Project, provide project management expertise, support, and standards to Global Supplier Communication Project Team based on the NAO orientation as well as EDIFACT was defined as Global Standard for General Motors Corporation. This initiative had identified new opportunities and methods for attaining its objectives, such as improving customer service, enhancing competitive position, and increasing performance and productivity. The implementation of this project included as a result the use of EDIFACT as a facilitator to reengineering of organization's processes as required for business lifecycle improvement. Provide a centralized status report and serve as a guideline for project plans and status across the MERCOSUL.

Initiating Process - approx. 160 hours

- *Initiation* — Identified as project manager and given responsibility to obtain necessary personnel support across all MERCOSUL (Argentina, Paraguay, Uruguay etc) sites, to work as a project team. Five workshops and presentation were made in order to explain the objectives of the project to get the accomplishment of all areas recognizing that the project should begin and everybody must be committed with it. A strong and consistent process of negotiation and exchange of information with third parties (Value Added Network and Software house) was developed following the Purchase area rules related with internal procurement procedures in order to define a robust and clear selection criteria to hire and work with them;

Planning Process - approx. 320 hours

- *Scope Planning* — Based on purpose, which was enable Latin American Suppliers to EDI, communicate with GM plants through EDIFACT format. A written and documented scope statements were discussed with all impacted area to shape a vision of the future, build commitment for the project (change), and define EDIFACT concepts and techniques. The concepts, techniques, and how to plan, lead and implement included: activities that produce the goals and objectives of the project, organizations in the business and services related with the project, work sessions training with suppliers and Value Added Network plus Software House;
- *Scope Definition* — In accordance with the *Scope Planning* we established the major deliverables as follow:
 - Processes Identification;
 - GM and Suppliers Action Item;
 - Value Added Network and Software Houses Technical Requirements – Definition;
 - Value Added Network and Software Houses Certification Process;
 - Site Codes;
 - Master Schedule;

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- *Activity Definition* — For the Master Schedule was established and described the main activities for everyone involved with the project Value Added Network, Supplier, Software Houses and GM Team;
- *Activity Sequencing* — Just the activity list was defined and documented inter-activity dependencies;
- *Schedule Development* — Based on the Master Scheduled we refined the project activities into smaller and handled components, establishing an owner for each one;
- *Resource Planning* — A full time allocated team was defined by GM side;
- *Cost Estimating* — Based on the Resource Planning we established an estimate of the resources and technical interfaces should be needed though out the legacy systems which support the business needs at that time;
- *Cost Budgeting* — It was shared with GM Co., meeting and workshops were run out in order to define the contribution for it region around the world. Each region should specify the local business and systems interfaces needs;
- *Project Plan Development* – A strong and robust document was developed to support the implementation of the project with all managers helping identify areas of greatest strategic opportunity for EDI in the organization.

Executing Process - approx. 160 hours

- *Project Plan Execution* — Worked with teams to ensure project plan was performed. We have itemized a comprehensive list of the specific measurable tasks required, and provided resources estimates and estimated completion time including target date not just for GMB team but for the Value Added Network, Software Houses and Suppliers too;
- *Scope Verification* — Worked with the all Managers and stakeholders during the fortnightly Project Status Report Meeting so the steering committee evaluated the EDIFACT implementation progress against the strategic and operational objective of the plan. It was one of most difficult phase based on the fact of high number of suppliers involved in this project;
- *Quality Assurance* — The focal point here was ensure the required level of data integrity and reliability will be achieved in order to preserve the trustworthiness of all financial related systems;
- *Team Development* — Worked with teams as requested. Project Management – best practices – Concepts and recommendations were shared with project leads;
- *Information Distribution* — Provide to all teams the standardized information retrieval system and information distribution system. Basically developed and distributed during status report meeting;
- *Solicitation* — A benchmark process was developed with other companies by Purchase area together functional coordinators;

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- *Source Selection* — Developed by Purchase Area;
- *Contract Administration* — Developed by Purchase Area and the following topics were considered related with Value Added Network and Software Houses:
 - Supplier Company Information – Company history, maturity of its product, level of continuing development, size of installed base, and how do current users feel about the product and support;
 - Screen functionality – Support of the full EDIFACT standard, including edits, screens design, layout, standard key definitions etc;
 - Flexibility – the range of features under user control was extremely well defined, as well as how easy it is to attach user-developed features to the processing stream;
 - Installation/Maintenance – patterns well established with our IT area;
 - Support – installation support available if required, hot line available to answer questions and provide assistance over the phone, quality of user's manual well defined together end-users in two languages – English and Portuguese;
 - Error checking and data validation capabilities – were established with our Internal Control area;
 - Cost and other issues – the price was not the only part here considered but the total cost for initial implementation and ongoing operations was effectively considered too;
 - The amount of time that elapses between the end of transmission of data to a Value Added Network and the time it is available in a mailbox for the recipient's retrieval if that recipient uses the same Value Added Network;
 - The requirements for the use or cost of Value Added Network as coast-to-coast and international trading partners move to adopt EDI;
 - The level of service provided, such as response time, backup, and contingency arrangements;
 - Security requirements for network and mailbox, including timing of mailbox clearing;
 - Allocation of liability between the parties;
 - Audit trail requirements;
 - Information disclosures by the Value Added Network to other trading partners and;
 - Pricing.

Controlling Process - approx. 960 hours

- *Overall Change Control* — The Program Office had a change control process and escalation process which was used when necessary with program leads, in order to document, verify, and implement Baseline Change Requests;
- *Scope Change Control* — The scope control was part of the overall change control process. The main issue here was related with the roles & responsibilities of Value Added Network and Software Houses;

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- *Cost Control* — The main concern here was related with the new enhancements and mapping process for those data not present and how they will be supplied using the input capabilities from EDI software or whether they will be built into the data capture software of existing application systems;
- *Quality Control* — The teams were responsible for quality control. The peer project teams established weekly quality control meetings with technical measurements and procedures;
- *Performance Reporting* — Joint Program Office Review (see Communication Planning) status updated and meeting held every 6 weeks. Responsible for updating status of teams and rotate as facilitator of status meeting. Also involved in Operational Review of peer project teams every 2 weeks when functional management were updated and information documented in project plan;
- *Risk Response Control* — A strong and robust contract was built together Legal and purchase area based on the inputs of the functional leads. Penalties and contingency plan were defined together with Value Added Network and Software Houses.

Closing Process - approx. 320 hours

- *Administrative Closure* — Just a simple communication report to the suppliers and Value Added Network in accordance with Top Management, were generated in order to gather and disseminate the information to formalize a major deliverable or project completion;
- *Contract Closeout* – Specific contract documentation were developed with Value Added Network by Purchase area focused on security requirements, backup, contingency audit trail and information disclosures by Value Added Network and GM areas.

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Project 3 - Intercommunication Project Portfolio – Project Manager

(General Motors do Brasil Ltda)

March 1999 - June 1999 - approx. 800 hours

As Manager, led the Business Process involving all areas which were involved in key IT Strategic Projects around distant sites and combining different cultures from senior managers in order to define an effective system to optimize and control their performance related with Projects deliverables to General Motors do Brazil.

The results were a total and integrated project approach to running business in order to shrink time-to-market and increase organizational productivity besides a robust communication framework with all areas. The product of this concept-tool, developed with functional manager and their teams to realign the manner of handling projects; currently we have a much better communication and services

Initiating Process - approx. 80 hours

- *Initiation* — Identified a manager by sponsor, and defined roles and responsibilities with all functional managers from key areas impact and analyzed during previous IT Strategic Plan.

Planning Process - approx. 80 hours

- *Scope Planning* — With key functional managers, a robust and strong scope statement document for establish the fence of all areas involved and defined deliverables for each one;
- *Scope Definition* — Based on the new organization-wide managerial philosophy – Enterprise Project Management - basically we just focused on the key big projects in order to support the market demands providing for each area their goals in written document which described the major deliverables ant time-frame associated with the process to handling the project documentation;
- *Activity Definition* — Once the up front projects were taken care of – basic information gathering, fixing projects objectives etc – a Master Schedule were developed and mapped out an overview of the major activities in order to achieve the results;
- *Activity Sequencing* — Since the project was being launched and managed on virtual basis, we had to involve and document inter-activity dependencies among the areas of interface which became particularly critical to the success of the effort.

Executing Process - approx. 480 hours

- *Project Plan Execution* — Defined the responsible parties and key players for carrying out the activities defined with the areas and how they relate with each other in order to reach the results established;

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- *Scope Verification* — Map out the deviations with project team and realign the efforts in order to follow the previous scope;
- *Quality Assurance* — Not applicable;
- *Team Development* — Established the criteria and procedures for dealing with the inevitable changes that happens during the project;
- *Information Distribution* — Provide to all teams the standardized information retrieval system and information distribution system. We had defined specific communication channels that should be used besides status reports meetings and guarantee that the organization was fully involved. News Letters were distributed throughout Lotus Notes Application;
- *Solicitation* — Not applicable;
- *Source Selection* — Not applicable;
- *Contract Administration* — Not applicable.

Controlling Process - approx. 80 hours

- *Overall Change Control* — Project Office built a good and strong working relationship with all areas involved based on the fact that a lot changes would be inevitable so procedures to ensure the smooth flow of the project effort would be mandatory with functional leads of each area. All significant modification were communicated to the Top Management;
- *Scope Change Control* —The scope control was part of the overall change control process;
- *Cost Control* — Articulated with Financial areas the requirements involving business case criteria, ROI, and any other topic related with optimization cost;
- *Quality Control* — Developed working relationships with internal quality programs and project quality criteria;
- *Performance Reporting* — Established a system for tracking the effectiveness of the communication related with Project Team performance. Basically the project status report were presented during the Management Information System Meeting;
- Risk Response Control — Not applicable.

Closing Process - approx. 80 hours

- *Administrative Closure* —A robust report with the lessons learned during the project was presented to the Steering Committee;
- *Customer Feedback* — A robust comparison between the baseline and the results was presented and suggestions from impacted area was requested;
- *Conclusion and Current Activities* – The process for developing this project hinges on the ability to obtain an ordinary overview of the proposed steps required to implement the main concept behind the Intercommunication Project Portfolio.

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Project 4 – Imported Material Payment and Account Control Tool - (IMPACT) – Manager

(General Motors do Brasil Ltda)

July 1998 - December 1998 - approx. 960 hours

As Manager, led the System Development involving Foreign Accounts Payables in order to define an effective control to tracking and measure the payment process related with documentation, follow-up, and management of imported material beside systems and functional interfaces with legacy systems.

The results were a development of a multi-user system (Client-Server) totally integrated providing an electronic and effectiveness control of the process reducing the costs of communication, infrastructure, re-work, processing time reduction, improvement of security access process besides other on going and intangible costs reduction.

Initiating Process - approx. 160 hours

- *Initiation* — Identified the need of the project and formally recognized that the project has high priority to organization so were determined the responsible parties and players for carrying out the project (roles and responsibilities) and how they were related to one another organizationally.

Planning Process - approx. 480 hours

- *Scope Planning* — The boundaries of the project was developed including in the scope statement the impacted areas like Fiscal Record Emission, Imported Material Accounting Handling, Creditors Accounting;
- *Scope Definition* — Major deliverables including Business Processes Redesign processes for teams based on existing organizational processes like on-line process to input data on Creditor Accounting, on-line process to research information related to Imported Material Accounting, Daily Fiscal Record Report, Imported Material Consistency Report etc;
- *Activity Definition* — As a project manager I spent and built together all tree involved areas the Master Schedule declaring what project activities and action items would require special attention during the project;
- *Activity Sequencing* — Functional and Technical team had identified and documented inter-activity dependencies not just for the main tree areas impacted but across all the current organizational processes interface.

Executing Process - approx. 160 hours

- *Project Plan Execution* — Developed with Functional and Tech all detail related with processes and areas involved to guarantee that project plan would perform in accordance

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with baseline established. During this phase the main concern were the technical issues discovered across the development besides the need to reshaping the functional processes without any or excessive costs and implementation delays;

- *Scope Verification* — The key action item were the Positive Attitude got from the Management base on the fact that every “bad news” were categorized as an opportunity and all modification must be discussed and shared with all impacted area including the suggestion from every member of Project Team;
- *Quality Assurance* — Not applicable;
- *Team Development* — Again, during this Project proactive attitude were the main feature and the Empowerment to all employee participation in identifying and making process changes were a standard for all activity across the project;
- *Information Distribution* — Provide to all teams the standardized information retrieval system and information distribution system. The main issue was to establish the procedures to confirm – double check – related with inconsistency from Imported Material information which in the current system were input manually by end-users;
- *Solicitation* — It was stretched with Purchase Team during this phase;
- *Source Selection* — Not applicable;
- *Contract Administration* — It was coordinated together Purchase Team and myself in order to meet the contractual requirements. The main concern here was with security and contingency plan linked with penalties if applicable.

Controlling Process - approx. 80 hours

- *Overall Change Control* —The Program Office had a change control process and escalation process that was used when necessary with program leads, documenting, verifying, and implementation Baseline Change Requests were defined and spread out to all impacted areas ;
- *Scope Change Control* — There were few simple principle for Scope Change Control:
 - Every proposed change must be written down and the record kept with Project Office Staff;
 - The business reason for each change request must be fully understood and justified;
 - A level of priority must be agreed with end-user request;
 - Every change must be checked and communicated for all impacted area;
 - Every change must follow a plan;
- *Cost Control* — The system would provide a new capability whose value of not doing these new functions will be higher than the current system’s costs;
- *Quality Control* —The teams were responsible for quality control. The quality of this – system application project - was a combination of a number of factors including:
 - Adaptability;
 - Completeness;
 - Data Quality;

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- Efficiency
- Friendliness;
- Portability;
- Maintainability;
- Reliability;
- Security;

A clear and strong metrics definition was proposed for each one of the factors above in order to measure the end-user satisfaction.

- *Performance Reporting* — A status report during the Management Information Systems meeting were developed ensuring the commitment with the goals of the project and confirming the fully involvement of all with the project;
- *Risk Response Control* — A formal and fortnightly brainstorming session with the team and end-users to get a list of potential problem was established. After an assessment of impact for those most severe potential problems should be defined and an action or contingency plan, in case of not possible prevention to it, must be followed by someone of the members of Project Team.

Closing Process - approx. 80 hours

- *Administrative Closure* — A sponsor review meeting was done before to go over with other. A robust Project File with all documentation and correspondence related to the project was set up in order to provide all information about this initiative for every one who wants to get any history about decisions, project changes etc;
- *Customer Feedback* — A table with the intermediate major deliverables was presented to the main impacted areas – internal clients – in order to evaluate the project.

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Project 5 – Finance IT Strategic Plan – Project Manager

(General Motors do Brasil Ltda)

June 1997 - March 1998 - approx. 1,920 hours

The objectives of this project was to serve as:

- as a guideline and a tool for communication;
- support the user's needs;
- support to new plants implementation;
- follow corporation orientation;
- be linked with GMB IT Strategic Plan.

Initiating Process - approx. 160 hours

- *Initiation* — Identified as project manager and given responsibility to obtain necessary personnel support across all sites, to work on team. Workshops and presentation were made in order to explain the objectives of the project to get the accomplishment of all areas recognizing that the project should begin and everybody must be committed with it. The main focus of project approach was to determine priorities based on the needs to support the new plants implementation:
 - Timeframe;
 - Resource Availability;
 - Centralized core Financial Business Process (forecast to Shared-Services Concept);
- Areas strongly involved:
 - Legal Support
 - Administrative Support Services
 - Development & Tracking Financial Plans
 - Development & Management of Future Projects – Cost & Price
 - Appropriate Funds
 - Management of Payable & Receivable
 - Development & Management of Current Product Costs
 - Management of Fixed Assets
 - Development of Current Product Price
 - Maintenance of Financial Accounts
 - Management of Funding and Investment Activities
 - Plan Taxes
 - Management of Insurance Activities
 - Management of Import Material Documentation.

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Planning Process - approx. 320 hours

- *Scope Planning* — Based on purpose described above was established. A written and documented scope statements were discussed with all impacted area to identify the Vision of Current Situation and shape a Vision of the Future, building commitment for the project (change), and defining the major deliverables of the project. The concepts, techniques, and how to plan, lead and implementation process were developed with all in order to produce the Scope Definition:
- *Scope Definition* — In accordance with the *Scope Planning* we established the major deliverables as follow:
 - Vision of Current Situation – (VCS)
 - General Motors do Brazil – (GMB) Systems Landscape;
 - IT and Business Processes Findings;
 - High Level Requirements;
 - Major Risks;
 - Business Opportunities;
 - Vision of Future – (VOF)

One of the major deliverables of this Project was to establish the VOF based on the fact that the Strategy was concerned with creating a business environment in which the right Information Systems (IS) applications could be identified to satisfy demand. A document with the details of business requirements and application needs were developed aligned with following strategic topics:

 - Customer Enthusiasm;
 - Marketing;
 - Profit Leadership;
 - Employee Enthusiasm;
 - Product;
 - Manufacturing;
 - Global Growth;
 - Latin America Operations – LAO: Maximize Regional Profit by Optimizing revenue, Minimizing Cost and Implementing Lean/Common Processes and Systems;
 - GM Finance Common Process & System Vision;
- *Activity Definition* — Basically this process was elaborated across a series of Workshops developed between EDS Company and all areas involved in the project which took about three months;
- *Activity Sequencing* — Not applicable;
- *Schedule Development* — Based on the major deliverables produced we had refined the project activities into smaller and handled components, establishing an owner for each one;
- *Resource Planning* — A full time allocated team was defined from each impacted area;
- *Cost Estimating* — Based on the Resource Planning we had established an estimate of the resources and technical interfaces should be needed though out the legacy systems which

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support the business needs at that time;

- *Cost Budgeting* — Not applicable;
- *Project Plan Development* – A document was developed to support the development of the project where we had developed measured results for each proposed goals covering open issues with all managers helping them to identify areas of greatest strategic opportunity with the project and how to get there using Top Management support based on the Vision of Future linked with individual achievements and with linked rewards.

Executing Process - approx. 960 hours

- *Project Plan Execution* — Worked with teams to ensure project plan was performed. A specific survey with end-users named Requirement Determination Process with all impacted areas involved related with systems needs. Beside this specifics workshops with Top Management was developed in order to define the strategic needs based on the Vision of Future. The final deliverable was a robust report with all business and systems needs prioritized and two alternatives to reach the objectives established during the workshops and interviews applied;
- *Scope Verification* — Worked with the all Managers and stakeholders during the fortnightly Project Status Report Meeting so the steering committee evaluated the project implementation progress against the strategic and operational objectives of the plan;
- *Quality Assurance* — The focal point here was ensure that the project was aligned with major drivers which had influenced this plan as mentioned before;
- *Team Development* — Worked with teams as requested. Project Management – best practices – Concepts and recommendations were shared with project leads;
- *Information Distribution* — Provide to all teams the standardized information retrieval system and information distribution system. Basically developed and distributed during status report meeting;
- *Solicitation* — Not applicable;
- *Source Selection* — Not applicable;

Controlling Process - approx. 240 hours

- *Overall Change Control* — The Program Office had a change control process and escalation process which was used when necessary with program leads, in order to document, verify, and implement Baseline Change Requests in order to follow the major drivers;
- *Scope Change Control* — The scope control was part of the overall change control process. The main issue here was related with the local needs of GMB Business Strategy based on the fact that legal and local market features of the country could strongly impact the objectives to follow the GM Co.;
- *Cost Control* — The main concern here was related with the new enhancements and mapping process in order to guarantee the local needs and provide the best environment to manage the demand of right IS applications and optimizing the benefits that new applications

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would provide aligned with the optimization cost too;

- *Quality Control* — The issue here was: if the tactics action items would well managed but strategy not, the “beautiful” systems will be built aligned with GM Co., but they would serve no local useful business purpose so we strongly pointed out to the strategy objectives together all managers involved in the project;
- *Performance Reporting* — During the project a series of conferences call were made with the GM Co. Strategy Board and GMB Project Team in order to provide a Project Status Report and ensure that the initiatives were aligned with the Major Drivers focusing on the objective to create and exploit business opportunities;
- *Risk Response Control* — The main activities developed here were the systematic process of included in Risk Management approach but the focus was on the impact of not follow the GM Co. Strategy based on the local system current situation;

Closing Process - approx. 240 hours

- *Administrative Closure* — A workshop with all the Managers from areas involved was made showing the results gained with the project and the alternatives possible to follow including a Final Report and Report Meeting which served as baseline/input to GMB IT Strategic Plan;
- *Project Closing Process* – A checklist for closing the project with detailed documentation was developed with a list of pending activities like Identify remaining work, Closing/Termination Plan Personal Evaluations, Staff reassigned, Final Staff Meeting etc.

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Project 6 – Executive Information Systems (Business Unit Decision Support) – Project Manager

(Agrícola Vinifrut Ltda.)

August 1996 - November 1996 - approx. 640 hours

The purpose of this project was to met the following requirements of the Strategic Board of company serving as a:

- Support decision making process;
- Be applied to all business cycles (Planning, Budgeting, Performance, Reporting, Analysis);
- Establish a uniform format for use by various departments in identifying and reporting their respective set of information, status and needs;
- Tool to reduce time necessary to assess any new initiative or project which could impact the company strategy;
- Offer simulation capabilities by the executives themselves.

Initiating Process - approx. 80 hours

- *Initiation* — Identified as project manager and given responsibility to obtain necessary personnel support across all sites, to work on team. Workshops and presentation were made in order to explain the objectives of the project to get the accomplishment of all areas recognizing that the project should begin and everybody must be committed with it. The main focus of project approach was to determine priorities based on the needs to support the top management needs:
 - Timeframe;
 - Resource Availability;
 - Centralized core Financial Business Process (forecast to Shared-Services Concept);
- Areas strongly involved:
 - Legal Support
 - Administrative Support Services
 - Development & Tracking Financial Plans
 - Development & Management of Future Projects – Cost & Price
 - Appropriate Funds
 - Management of Payable & Receivable
 - Development & Management of Current Product Costs
 - Management of Fixed Assets
 - Development of Current Product Price
 - Maintenance of Financial Accounts
 - Management of Funding and Investment Activities
 - Plan Taxes
 - Management of Insurance Activities
 - Management of Import Material Documentation.

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Controlling Process - approx. 80 hours

- *Overall Change Control* – defined a change control system for the project (identifying the best tool and documenting the procedures for handling changes) and control rigorously each deliverable change request approval;
- *Schedule Control* – weekly update schedule and control needed changes to bring schedule into line with the project plan;
- *Quality Control* – monitor great variety of project results through graphs and charts and discuss with functional managers alternatives to eliminate causes of unsatisfactory performance;
- *Performance Reporting* – monthly present to functional managers and project leaders the performance reports based on deliverables and processes reviews.

Closing Process - approx. 80 hours

- *Administrative Closure* – generated needed information to formalize phases completion;
- *Contract Close-out* – documented final report was developed and distributed to all impacted areas.

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Project 7 – IT Strategic Plan – Project Manager

(Rhodia Pharma S/A)

February 1996 – July 1996 - approx. 960 hours

The objectives of this project was to serve as:

- as a guideline and a tool developing an information architecture;
- Making effective use of the data resource;
- Improving Information Systems strategic initiatives;
- Optimize the integration of data processing, office automation, and telecommunications ;
- Managing data and information resources.

Initiating Process - approx. 160 hours

- *Initiation* – meeting with stakeholders to define the systems related with the Business Strategy in order to renovate and the rules of renovation. Meeting with the group to orient them about the rules and internal client expectation.

Planning Process - approx. 320 hours

- *Scope Planning* – developed a written scope statement, describing project justification and objectives, besides business objectives, vision, methodology to be used, tools, planning team, presentations – milestones -;
- *Scope Definition* – developed project WBS, leveling customers expectations on the deliverables they would receive based on the organization structure – preliminary Business Model discussed in order to cover all impacted areas;
- *Activity Definition* – defined project activities;
- *Activity Sequencing* – defined activity interdependencies besides application sequence, migration plan;
- *Activity Duration Estimating* – worked on duration estimates together with Project Office Manager;
- *Schedule Development* – created a schedule with the team;
- *Resource Planning* – estimated number of human and hardware resources;
- *Project Plan Development* - developed some elements of project plan applicable to the nature of the project like definition of new architecture, data application distribution in order to support the Business Strategy;

- *Facilitating Process* -

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- *Quality Planning* – planned some quality reviews at project key points;
- *Organizational Planning* – defined a roles and responsibilities document;
- *Communications Planning* – developed a communications plan together with the customer;
- *Risk Identification* – identified and documented initial risks like critical applications and communication links with other countries;

Execution Process - approx. 160 hours

- *Project Plan Execution* – Weekly formal status meetings with the group and Project Office Manager, and daily follow is applicable too because the nature of the project;
- *Scope Verification* – Worked with the all Managers and stakeholders during the weekly Project Status Report Meeting so the steering committee evaluated the project implementation progress against the strategic and operational objectives of the plan;
- *Quality Assurance* – established final review of specifications by customer together with the technical provider;
- *Information Distribution* – worked in maintaining customers aware of all assumptions.

Controlling Process - approx. 160 hours

- *Overall Change Control* – followed the standardized change control management plan and controlled rigorously changes to each project deliverable;
- *Scope Change Control* – several times, negotiated with customers scope changes, bringing schedule and cost variations;
- *Schedule Control* – coordinated schedule updates and followed configuration management procedures to ensure the ultimate version is the one available for all stakeholders;
- *Quality Control* – monitored some of project results and discussed with team ways to minimize or eliminate causes of unsatisfactory performance.

Closing Process - approx. 160 hours

- *Administrative Closure* – generated needed information to formalize project completion;
- *Contract Closeout* – A checklist for closing the project with detailed documentation was developed with a list of pending activities like Identify remaining work, Closing/Termination Plan Personal Evaluations, Staff reassigned, Final Staff Meeting etc.

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Project 8 – IT Strategic (Downsizing) Plan – Manager

(Rio de Janeiro Refrescos Ltda)

May 1996 – October 1996 - approx. 960 hours

The objectives of this project was to serve as:

- a guideline and a tool for communication and IT cost reduction process;
- support the user's needs;
- support to find out opportunities which will lead to advantage;
- framework to application management;
- organization reference to successful IS/IT.

Initiating Process - approx. 80 hours

- *Initiation* — Identified as project manager and given responsibility to obtain necessary personnel support across all sites, to work on team. Workshops and presentation were made in order to explain the objectives of the project to get the accomplishment of all areas recognizing that the project should begin and everybody must be committed with it. The main focus of project approach was to determine priorities based on the needs to support the Business Strategy:

Planning Process - approx. 80 hours

- *Scope Planning* – developed a written scope statement, describing project objectives and high level requirements base on external and internal inputs, by using techniques (Senior Management interviews) to produce objectives, policies to follow and action plans – what needs to be done - ;
- *Scope Definition* – subdivided major deliverables into more manageable components;
- *Activity Definition* – defined project activities;
- *Activity Sequencing* – defined activity interdependencies;
- *Activity Duration Estimating* – applied a commercial estimating tool based on resource requirements and capabilities and discussed results with experienced group;
- *Schedule Development* – developed a baseline schedule;
- *Resource Planning* – estimated number of human and hardware resources;
- *Project Plan Development* - developed some elements of project plan applicable to the nature of the project. The focal point here was to translate the statement of requirement produced together with the end-users into technology-based solutions – how the needs could be satisfied;
- *Facilitating Process* -

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- *Quality Planning* – N/A;
- *Organizational Planning* – defined a roles and responsibilities document, including:
 - a description of the project;
 - a priority for the project;
 - the objectives of the project, and how they will solve the major problems;
 - the cost of the project to the company;
 - a comparison of the benefit of the project to the projected cost;
 - the judgement of the importance of the project was presented the Top Management; and what happen if it were delayed or cancelled;
- *Communications Planning* – developed a communications plan together with all customers;
- *Risk Identification* – identified and documented initial risks;

Execution Process - approx. 480 hours

- *Project Plan Execution* – work with team in weekly status meetings based on the Organizational Planning described above;
- *Scope Verification* – Worked with the all Managers and stakeholders during the fortnightly Project Status Report Meeting so the steering committee evaluated the project implementation progress against the strategic and operational objectives of the plan. The following activities were developed with all Managers in order to have clearly stated policies of the Project:
 - Roles & Responsibilities charts were developed with all impacted area;
 - These charts were defined as a binding contract between the Project and all involved areas;
 - The relationship between the project participants and their departmental managers were very clear defined, so that there was a complete understanding of each individual's role;
- *Quality Assurance* – N/A;
- *Information Distribution* – worked in maintaining customers aware of all assumptions and changes required.

Controlling Process - approx. 160 hours

- *Overall Change Control* – defined a change control system for the project (identifying the best tool and documenting the procedures for handling changes) and control rigorously each

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deliverable change request approval;

- *Schedule Control* – weekly update schedule and control needed changes to bring schedule into line with the project plan;
- *Quality Control* – N/A;
- *Performance Reporting* – monthly presented to functional managers and project leaders the performance reports based on deliverables and processes reviews.

Closing Process - approx. 160 hours

- *Administrative Closure* – generated needed information to formalize phases completion;
- *Contract Closeout* – documented final products of the project.

Project 9 – IT Strategic Plan – Project Manager

(Editora Abril S/A)

December 1996 – March 1997 - approx. 640 hours

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The objective of this project was to met the following requirements of the Strategic Board of company serving as a:

- Guide to prioritize the initiatives aligned with the Business Reengineering Project established before;
- Be applied to all business cycles (Planning, Budgeting, Performance, Reporting, Analysis);
- Establish a uniform format for use by various departments in identifying and reporting their respective set of information, status and needs;
- Tool to reduce time necessary to assess any new initiative or project which could impact the company strategy;
- Offer simulation capabilities by the executives themselves.

Initiating Process - approx. 80 hours

- *Initiation* — Identified as project manager and given responsibility to obtain necessary personnel support across all sites, to work on team. Basically we defined and established the relationship of the project between the senior executives and the project. In particular we considered during several workshops the degree to which the executives support the project.

Planning Process - approx. 240 hours

- *Scope Planning* – developed a written scope statement, describing project objectives and high level end-users requirements aligned with the goals for project, establishing the limits of the scope;
- *Scope Definition* – subdivided major deliverables into more manageable components which was presented to all managers and areas involved;
- *Activity Definition* – defined project activities;
- *Activity Sequencing* – defined activity interdependencies including the pending activities related with the Business Reengineering Project in order to avoid conflicts with other projects participants;
- *Activity Duration Estimating* – applied a commercial estimating tool based on resource requirements and capabilities and discussed results with experienced group;
- *Schedule Development* – developed a baseline schedule and here there was a particular feature because the Senior Management was strongly involved;
- *Resource Planning* – estimated number of human and hardware resources;
- *Project Plan Development* - developed some elements of project plan applicable to the nature of the project;
- *Facilitating Process* -

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- *Quality Planning* – planned some quality reviews at project key points;
- *Organizational Planning* – defined a roles and responsibilities document;
- *Communications Planning* – developed a communications plan together with the customer and with internal Human Resources Department ;
- *Risk Identification* – identified and documented initial risks;

Execution Process - approx. 160 hours

- *Project Plan Execution* – worked with team in weekly status meetings;
- *Scope Verification* – obtained a common understanding of what would be the customization if it were made including a product review from all managers involved in the project;
- *Quality Assurance* – performed some initial quality reviews in the project plan;
- *Information Distribution* – Provide to all teams the standardized information retrieval system and information distribution system. Basically developed and distributed during status report meeting.

Controlling Process - approx. 80 hours

- *Overall Change Control* – defined a change control system for the project (identifying the best tool and documenting the procedures for handling changes) and control rigorously each deliverable change request approval;
- *Schedule Control* – weekly update schedule and control needed changes to bring schedule into line with the project plan which included:
 - Integrating the Project Base Line Plan as a tool so that the project participants were encouraged to review the plan with a simple and comprehensive tool/reports;
 - Formally monitoring at fixed intervals, by defining in advance the criteria and schedule previously defined for reporting in the Project Plan and structuring the review meetings;
 - Taking corrective action in time and in accordance with the new critical Business Processes before established;
- *Quality Control* – monitor great variety of project results through graphs and charts and discuss with functional managers alternatives to eliminate causes of unsatisfactory performance;
- *Performance Reporting* – monthly presented to functional managers and project leaders the performance reports based on deliverables and processes reviews.

Closing Process - approx. 80 hours

- *Administrative Closure* – generated needed information to formalize phases completion;
- *Contract Closeout* – documented contract completion.

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