

DANIEL J. MONTGOMERY



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Summary

Dan has a 30 year background as a counsellor, manager, internal and external consultant, trainer and executive coach.

His specialty is facilitating individuals and management teams through important conversations about purpose, strategy, business plans, roles and responsibilities, and performance feedback.

Dan is skilled at translating strategies into concrete business models and plans, measurable performance objectives, required cultural change and personal growth. Dan's approach addresses three inter-related aspects of personal and organizational performance:

- Business focus, planning and performance management
- Collaboration, trust and culture
- Personal leadership

Dan has worked with a number of performance management tools including Balanced Scorecard, behavioral performance ratings, and 360° feedback. In

addition to his coaching experience, Dan has worked in the areas of strategy development, business planning, market research, process improvement, and organization development, and has in-depth experience in management of information technology.

He was a Senior Manager for Ernst & Young, where he created a multi-disciplinary team focused on the emerging high tech market, in addition to serving clients in the electric utility, health care and telecommunications industries. He also worked as a manager for Andersen Consulting (now Accenture), where he provided change management services to support large IT implementations in the government sector. Dan has been an independent coach and consultant since 2002. Current clients range from emerging technology companies, to not-for-profits, to Fortune 100 companies.

Dan is a member of the Institute of Management Consultants and holds the Certified Management Consultant (CMC) designation. He also holds the designation of Certified Systems Professional (CSP) from the Institute for Certification of Computer Professionals.

Dan is a member of CORE (Connected Organizations for a Responsible Economy), an association promoting sustainable business practices and opportunities in Colorado. He also serves as Vice President of the Ridge Homeowners' Association.

Industry Background

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

Education

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

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

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

Master of Arts, Psychology - 1978
Naropa University, Boulder, Colorado

Bachelor of Arts, Interdisciplinary Studies - 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.

Balanced Scorecard: Measuring and Valuing Intangibles

Over the last three years, Dan has delivered his 2-day Balanced Scorecard development workshops publicly through university professional development services and professional associations. In addition, he has conducted private workshops for a number of individual client organizations, including educational institutions, economic development agencies, professional services firms, and manufacturers. As one recent participant put it:

"Dan is able to translate these concepts into layman's terms, and has a practical, hands on approach with a lot of common sense built into it."

Previous Employment History

2002 - 2004 FOUNDDING PARTNER

Halifax Global Management Consultants, Halifax, Nova Scotia

- Established a regional management consultancy with six partners, with services in the areas of strategic and business planning, corporate performance management, leadership assessment and training.
- In addition to regular sales and project delivery responsibilities, took leadership for development of proprietary consulting methodologies.

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.
- Developed implementation plans for NovaLIS land records technology within the Nova Scotia Department of Municipal Affairs.
- Restructured organization and rationalized 25-person workforce.
- Completed ISO 9002 certification.

1992-1995 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.

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 HUMAN RESOURCE INFORMATION ANALYST
Bergan Mercy Hospital, Omaha, Nebraska

- Developed a comprehensive set of administrative processes, forms, and computer programs to support the implementation of a state-of-the-art behaviourally-based performance appraisal system.
- Designed, coded and implemented other personnel applications, including 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 Centre within the MIS Division.

1978 – 1981 PERSONNEL OFFICER AND MENTAL HEALTH WORKER
Mental Health Center of Boulder County, Colorado

- Served as Personnel Officer, with responsibility for recruiting, job classification and compensation management.
- Worked part time as a counsellor in a residential treatment facility for severely disturbed adults.

1975 – 1976 SUMMER INTERN PROGRAM ADMINISTRATOR
Washington State Department of Personnel, Olympia, Washington

- Managed all aspects of the State's Summer Internship Program for university students.
- Responsibilities included publicity, recruiting and organization of social and educational events for interns.