

Mike Stoke

Business Consultant

Curriculum Vitae

Mike is an experienced, senior business consultant and strategist with particular expertise in the strategic use of internet and wireless technologies.

He focuses on the development and management of sustainable business value. He also assists his clients raise equity, commercialise intellectual property, raise equity or exit their businesses.

He brings to his clients an extensive track record of strategy development, business modelling and process review from work with clients in Government, Energy, the Primary sector, Manufacturing, Information Technology, Banking and Insurance, and other sectors.

February 2005

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Biographical Data

Name: Michael John STOKE

Current Position: Director, Stoke Consulting Services Ltd
Principal Consultant, Martech Consulting Group

Born: England, 1955

Education: GCE 'O' and 'A' Levels in Rhodesia (Zimbabwe)
B.Sc. (Engineering, Electrical), University of Cape Town, 1977

Languages: English (fluent)

Citizenship: New Zealand, Great Britain

Family Status: Married, three children.

Professional Societies: Australian Institute of Company Directors
Institute of Directors in NZ Inc
NZ Strategic Management Society

Countries Worked in: Australia, Hong Kong, Laos, New Zealand, South Africa,
Zimbabwe

Training: Certificate in Company Direction (IoD, NZ)
Strategic Selling
Presentation Skills (Rogen)
Various In-house Programs (PA Consulting Group), including:

- problem-solving and other consulting skills
- project management techniques
- business modelling
- business process redesign
- strategy development
- economic value analysis.

Contact Details

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Employment
Record

2005 to date

Mike Stoke & Associates Pty Ltd

Incorporated in Queensland in February 2005.

1996 to 2004

Stoke Consulting Services Ltd, New Zealand

Consulting assignments in New Zealand in business strategy development, strategic planning and implementation, business and venture valuation, valuation and strategy development in relation to intellectual property, preparation of offering memoranda, training and mentoring of senior management, review of business processes and supply management.

Sector-based assignments including reviews of the effectiveness of innovation and knowledge transfer processes, and facilitation of sector-based strategies.

Institutional restructuring in Laos on behalf of the Asian Development Bank, demand forecasting in Laos for the World Bank.

1985 to 1996

PA Consulting Group, New Zealand

Consulting assignments throughout New Zealand and Australia, in information and business strategy development, business process re-engineering, business performance improvement, corporate analysis and modelling, reviews of capital investment proposals.

Reviews of organisation performance, organisational restructuring and development, outsourcing arrangements, service level agreements between business units and discrete organisations.

Project management, production and resource management, industrial engineering.

Specialised in corporate and strategic analyses and reviews, organisational development, and the use of information for managing organisations in service, utility and public sectors.

1978 - 1983

McKenzie & Holland (NZ) Ltd, New Zealand

Design engineer for manufacturer of electrical equipment, responsible for initial design, overview of manufacture, installation and commissioning, ongoing customer liaison for a variety of thyristor-controlled industrial equipment used in heavy industry. Responsible for development and support of electrical products for the meat industry.

1972 - 1978

Electricity Supply Commission, Zimbabwe

Employed in a range of technical, operations and maintenance departments of this national power utility (during scholarship programme).

Other Interests
and
Accomplishments

Sporting:

Competitive:

- National Title-holder and Rhodesian Rep., Swimming, 1971
- Full Blue, Swimming, University of Cape Town, 1974
- Full Blue, Underwater Hockey, University of Cape Town, 1977
- Rhodesian Rep., Underwater Hockey, 1976
- Western Province Rep., Underwater Hockey, 1977
- New Zealand Rep., Underwater Hockey, 1980 - 1988
- Bronze Medallist, 1986 World Underwater Hockey Championships

Administrative:

- Event Manager, South African Universities Swimming Carnival, 1974
- Managed University of Cape Town teams in various competitions, 1975 - 77
- Member, University Sports Committee, 1976
- Established Underwater Hockey as a sport in NZ, using NZ Underwater Association as a vehicle, 1978
- Chairman, Underwater Hockey Committee of the NZ Underwater Association, 1981 - 84
- Player/Coach/Manager, NZ Mens' Team, 1984 World Underwater Hockey Championships
- NZ Rep., CMAS Rules Subcommittee, 1984-1986
- International Referee, various international underwater hockey competitions, 1986 - 94
- Coach, Scots College (Wellington) underwater hockey teams, 1986 - 88
- Selector, various regional and NZ representative underwater hockey teams, 1986 – 94.

Interests:

Family, squash, windsurfing, diving, tramping, technology, other cultures.

**Sector
Development,**

**Institutional
Restructuring
and
Strengthening**

**Ministry of Economic Development
2002 – Three months**

Responsible for economic analysis of the Tararua region of New Zealand as part of a project preparing a regional development strategy for this rural area, and carried out QC / peer review.

**Ministry of Agriculture and Forestry
2002 – Three months**

Member of a team of consultants and sector representatives preparing a development strategy for the Organics Sector in New Zealand. Project was highly inclusive, involving a comprehensive series of interviews, workshops and surveys, with frequent feedback to sector representatives.

**Foundation for Research, Science and Technology
2001-2003 – Two Years**

Co-leader of a research project in the **Tourism industry**, intended to identify, specify and build support for e-Business solutions for small to medium size businesses in the industry. Worked with industry operators and representatives and with solution providers to:

- develop real-time inventory management as a strategy
- promote the use of global standards for web services
- build ownership of the solutions.

**Waste Management Wairapapa, NZ
2000-2001 - Four months**

Worked with civil engineers to construct a spreadsheet-based financial and operational model of waste disposal in the Wairarapa region. Developed projections, identified and evaluated strategic options using the model, and advised local Government in the region in relation to these options. Followed up impact papers from the perspective of each local authority.

**Ministry of Agriculture and Forestry, NZ
2000 - Three months**

Carried out extensive interviews and research in order to assess the probable impact of e-Commerce on the rural community in NZ. Advised MAF of the issues involved, and made recommendations for resolving these issues. Member of Rural Sector Panel at eCommerce Summit (October 2000).

**Auckland City Council
2000/1999 - One month**

After assisting the Council with strategy development, continued to work on behalf of the Council by facilitating a number of fora intended to generate a consensus among regional and national interested parties about strategy on a variety of topics.

**Canterbury Development Corporation
1999 - One month**

Advised CDC on their bid for initial funding and support for the development of a local business incubator.

**Sector
Development,**

**Institutional
Restructuring
and
Strengthening**

... continued

**Vision Manawatu
1999 - One month**

Analysed Goodman Fielder's New Zealand activities in order to assess the probable impact on Palmerston North of their takeover of Ernst Adams. Prepared a presentation on behalf of the region to persuade Goodman Fielder to extend their use of Palmerston North facilities, and fronted the presentation to Goodman Fielder's executive. The exercise was successful.

**Fruitgrowers Federation
1998 - Three months**

Developed and published a review of the fruit industry intended to attract investment into the industry. Strategies were developed based on the industry's track record of successful innovation, and its ability to remain differentiated at the high value end of global fruit markets.

**Ministry of Research, Science and Technology
1998 - Three months**

Reviewed the effectiveness of innovation processes and knowledge transfer mechanisms in the fishing industry, and made recommendations for changes in science policy and funding.

**World Bank
1997 - One month**

Developed a demand forecasting model for Electricité du Laos planners, to support their business planning.

**Asian Development Bank (TA 2569-LAO)
1996/97 - Four months**

Deputy leader, strategic planner and analyst in a technical assistance project to investigate options for the restructuring and institutional development of Electricité du Laos (EdL).

An operational strategy was developed for EdL, offering the best prospects for EdL's development as a viable, autonomous institution, and for its ability to support government objectives for the ongoing development of the power sector in Lao PDR.

Major areas of weak performance in EdL were identified, and specific recommendations for improvement developed. Identified costs and benefits to EdL and Lao PDR of government objectives to increase the electrification ratio and to maximise earnings from the export of power. EdL's policies for private sector involvement and rural electrification were reviewed, and improvements recommended.

Reviewed rural electrification to determine an appropriate level of involvement by government to meet its objectives in this area without detriment to EdL's financial condition. Developed realistic, achievable financial projections offering EdL the best prospects for achieving the financial and operational objectives defined by the study.

Corporate plans were developed to help ensure that the strategy could be implemented successfully, paying particular attention to issues surrounding participation by the private sector in the power sector, and to EdL's financial and institutional capabilities. The study was carried out so as to build ownership of the recommended strategy by EdL and government stakeholders.

Assignment
Record

**Sector
Development,**

**Institutional
Restructuring
and
Strengthening**

... continued

**Standards NZ
1995 - Six weeks**

Prepared a submission to Government on behalf of this client in relation to infrastructural changes needed to position SNZ more effectively in the NZ environment. This involved a substantial review of SNZ' current modus operandi, realignment of their performance information on business process lines, review of the value created by them for their customers, benchmarking of SNZ with similar organisations, review of options open to those customers and review of the possible methods of funding SNZ activity. Managed the preparation of documents as part of the submission.

Discussed options with Government in order to determine the best process for presentation of the submission and to smooth the way for the political process regarding the reviews to be made by other Government agencies.

**Ministry of Commerce
1992 - One month**

Reviewed strategic options relating to the Standards Association of NZ, Telearc and other organisations in order to recommend the optimal institutional arrangements for the Standards/Quality business.

**Business
Strategy
Development

(and Valuation)**

Recovered Materials Foundation Ltd

2004 – One month

Assisted this not-for-profit develop strategic options for management of Christchurch City's waste stream, an opportunity worth several tens of million dollars. Developed an interactive business model to evaluate options and risks, so as to inform RMF Board and prepare a business case for the City Council. The bid based on this work was successful.

Porirua City Council

2004 – One month

Prepared an interactive model to evaluate options for disposal of waste for the Council, and to determine the impact of several possible charging strategies in a competitive waste disposal business.

Top Energy Ltd

2002 – Two months

Developed strategic options for this energy utility to achieve a step increase in growth. Prepared financial projections based on the preferred scenarios, and developed an implementation plan for the restructuring and capability development required.

Quality Equipment Holdings Ltd

2003 / 2002 – Six months

Advised owners on exit strategies. Researched market, projected business development needs and cash flows, and undertook valuation. Prepared initial documents for potential purchasers and assisted during negotiations. Advised on actions to increase business value.

Txtstation International Ltd

2002 – Three months

Advised the principal on business creation and development. Developed strategy, valued business potential, prepared information memoranda, and assisted with first round funding. Undertook commercial analysis during first two ventures in order to gain understanding of market and develop product. Prepared business plans and documents to attract business partners and agents.

Carterton District Council

2002 – One week

Modelled options for management of water supply for the District. Contrasted the options available on a lifetime basis, and advised on factors affecting the decision.

Loadrite Technology Ltd

2001 – Two months

Undertook global market review, developed strategy for sale of the business and prepared an Offer Document.

Orica Ltd

2001 – One week

Facilitated development of business strategy for the New Zealand subsidiary of this global chemical company. Assisted with communication and planning of change management required as part of the strategy.

Assignment
Record

**Business
Strategy
Development**

and Valuation

... continued

The Business Doctor

2001 – One month

Advised on preparation for seed funding for this provider of online business tools. Prepared investor documentation.

Dannevirke District Council

2001 – One week

Modelled options for management of sewage for the town. Contrasted the options available on a lifetime basis, and advised on factors affecting the decision.

Enigma Ltd

2002, 2001 - One month

Assisted with preparation for first round and second funding by advising on strategy and preparing investor documents.

Loadrite Technology Ltd

2001 – One month

Facilitated a strategic review for this leading global provider of payload management solutions. Also reviewed and advised on distributor and manufacturing agreements.

WoolPro Ltd

2000 - Two months

Interviewed industry representatives and worked with WoolNet staff to identify future opportunities for this leading global online wool trading exchange. Developed strategy, valued the business, advised on commercialisation, identified potential strategic business partners, managed the preparation of an information memorandum, and advised the CEO on negotiating strategy.

ETel Group

2000 - One month

Worked with the board and executive of this information technology start-up to develop business strategy and position itself for its first funding round.

Enigma Ltd

2000 - One month

Worked with this leading online provider of health information and services to identify growth opportunities. Developed business strategy and positioning for seed capital raising. Continued to advise during negotiations with venture capitalists and other prospective investors.

Allergy Solutions Ltd

2000 - Two months

Developed business strategy for this importer/wholesaler of health products, involving online purchasing supported by a marketing campaign involving health professionals. Specified the website and project managed the establishment and finetuning of the site.

Zeacom (Voice Technologies Ltd)

2000, 1999 - Two weeks (each time)

Facilitated the development and review of business strategy for this information technology company as it went through two funding rounds and established itself in the USA.

**Business
Strategy
Development**

(and Valuation)

... continued

**HortResearch Ltd
1999/2000 - Two months**

Evaluated the market potential of a food packaging innovation. Assessed the potential market, determined an appropriate royalty regime, interviewed possible business partners and advised on commercialisation strategy to optimise the value to HortResearch of this intellectual property.

**Riversun Nurseries Ltd
1999 - Three months**

Advised the owner of this rapidly growing company in the wine industry on strategies to optimise business value. Developed business strategy, advised on the restructuring of the business, advised on capital raising strategies and assisted the preparation of an offering memorandum for investment by selected potential business partners.

**M² Technology Ltd
1999 - One month**

Advised this software developer on strategies to optimise the value of its products. Developed processes for internal priority setting of software design projects. Advised on methods to encourage business partners, using the principles of innovation.

Evaluated the option of creating a spin-off company to take one product to market, and prepared an offering memorandum to be used with selected potential business partners.

Developed a strategy for commercialisation of this product, and worked with potential investors in relation to the opportunity.

**Physio Holdings
1999 - One month**

Developed strategy for a group of independent health professionals to help them position themselves appropriately for deregulation of the ACC.

**Auckland City Council
1999/1998 - Five months**

Assisted the Council with its '*Beyond the Millennium*' programme to develop a Vision for the City by facilitating an extensive series of public workshops and undertaking the collation and analysis of results.

Structured and facilitated a strategy alignment process within the Council involving all the teams charged with developing specific strategies for liveable communities, transport, infrastructure development, waterfront development, etc.

**Jason Publishing Company
1997 - 1999**

Developed strategy in relation to the use of the internet by this company, prepared a business case and implementation plans.

Evaluated a potential acquisition to determine business fit and value to Jasons, and advised on negotiation strategy.

Continue to act in an advisory role, assisting the internet venture to grow and achieve profitability ahead of the original business plans.

**Business
Strategy
Development**

and Valuation

... continued

SDS Ltd

1998 - Two months

Valued this software services business, advised on strategies to maximise business value, advised on options to sell the business, and prepared an offering memorandum.

Royal Society of NZ

1998 - One week

Facilitated a group of people representing all parties interested in the marine environment, to develop a consensus of what actions needed for best management of the fishing resource and marine environment.

Bisset Engineering

1997 - One month

Valued intellectual property owned by this manufacturer of specialist agricultural equipment, developed strategies to sell rights to the property, and prepared an offering memorandum.

A National Wholesale and Retail Bookseller

1996 - One month

Valued this privately owned organisation for the owners prior to selling it. Identified short-term actions that would improve the value of the organisation, and advised on implementing these.

Telecom New Zealand

1995 - Two weeks

Facilitated Telecom's Business Development Group in developing a strategy for Telecom's preferred role with respect to the internet, its preferred positioning among the organisations likely to be involved in the new industry, and its preferred involvement in the range of business-related services expected to become available on-line, including electronic commerce, communication, distance learning and a variety of other forms of content and service provision.

NZ Dept of Survey and Lands Establishment Unit

1995 - Two weeks

Reviewed methods of valuing information assets and intellectual property in preparation for the establishment of a new State Owned Enterprise to provide services based on the spatial and topographic data held by the current Dept. Review emphasised economic value and the viability of the new organisation, given alternative pricing formulas for the information asset.

Canterbury Regional Council, New Zealand

1994 - Three months

Facilitated the development of corporate strategic plans for this local authority, working with group managers, facilitating additional workshops with Councillors, coördinating interviews with stakeholder representatives, and collating and analysing the results of the interviews for use in the workshops.

Supervised and coördinated a range of analyses done in-house to identify strategic options available in each service area, and brought them together to resolve priorities and prepare an overall corporate strategy. Guided development of corporate plans from the agreed strategies.

**Business
Strategy
Development**

and Valuation

... continued

Department of Social Welfare (CYP Group)

1993 - One week

Led the executive group of this organisation through a strategy development process in order to devise and implement an organisation structure in support of business objectives. Roles and responsibilities were defined, information requirements identified and performance indicators agreed.

Clyde Hydro Group, New Zealand

1993 - Two months

Evaluated the feasibility of establishing a Generation Management Centre for this newly established electricity generation group, responsible for 25% of New Zealand's electricity supply.

Evaluated developments in the industry; identified business requirements of the new organisation in the deregulated NZ Energy market; investigated staffing and information requirements; identified and evaluated strategic options; and made recommendations including a move in-house of information systems currently supplied by a bureau.

The business analysis plan was done in conjunction with an engineering consultancy that investigated the control aspects of the proposal.

Standards Association of New Zealand

1992 - Six weeks

Facilitated the development of a business strategic plan and coordinated the subsequent development of detailed business plans based on the strategy.

Department of Survey and Land Information

1992 - Two weeks

Facilitated the development of business strategic plans for this government department.

AFFCO Canneries

1992 - One week

Facilitated strategy development for the executive group.

Wellington Regional Council, New Zealand

1991 - Two months

Facilitated the development of strategic business plans for the operating divisions of the Council, and further developed the plans into full business plans. The operating divisions included Bulk Water supply, Forestry, River Management, Parks and Recreation, Technical Services and City Water Reticulation.

Royal New Zealand Navy (RNZN)

1990 - One month

Assisted CNS and staff in development of business strategy, and supervised preparations for the 1990 CNS Seminar to examine the strategy. Developed an implementation plan.

Telecom Equipment Supplies Limited

1990 - One week

Led a business strategy workshop with TES executives that resulted in fundamental changes to TES's organisation structure and approach to business.

**Information
Strategy
Development
(including
Process
Review)**

**Woolyarns Ltd
2001 – One month**

Reviewed options for upgrade of information systems for this prominent supplier of wool products. Advised on strategic options and opportunities using the internet.

**Lakeland Health
1999 - One month**

Reviewed a proposal for upgrading of information systems for this prominent health organisation. Assessed the risks involved, and advised on strategies to minimise these.

**Institute of Environmental Science & Research
1994 - Three months**

Led a team of consultants and senior staff in the development of an information strategy for this newly established Crown Research Institute. The study was part of a change process intended to achieve a substantial shift in the culture of the organisation and required careful management. Several significant strategic opportunities for providing competitive advantage were identified and evaluated. The study also involved substantial redevelopment of work processes.

**Canterbury Regional Council
1993 - Three months**

Led a team of senior staff in the development of an information strategy with a focus on improving the value to clients of information used by the organisation and on improving operational processes.

**NZ Treasury
1993 - Three weeks**

Reviewed the operations of the Tax Modelling Unit, identified and evaluated options for technological support of this Unit in the analysis and modelling of very large databases, and made recommendations.

**Natural Gas Corporation, New Zealand
1992/93 - Four months**

Led a team of senior staff in an information strategy study. This was undertaken immediately prior to deregulation of the gas industry and required reviewing and revising existing business strategies in order to ensure that the Corporation was optimally positioned within the industry.

Innovative opportunities were identified to obtain competitive advantage using information technology, including the use of SCADA data for commercial purposes. Deregulation of the industry opened the way for the establishment of energy traders, a wholesale trading market and a possible settlements function in the industry.

**Information
Strategy
Development
(including
Process
Review)**

... continued

**Prudential Assurance Company NZ Limited
1992 - One month**

Participated in a review of the finance area by investigating the production of management information. Identified methods to improve the efficiency of current production, evaluated other options for production, recommended an executive information system-based solution and prepared an implementation plan. The recommendation included the use of modelling tools to track and forecast trends of key performance indicators.

**Ministry of Housing (Tenancy Bond)
1992 - One month**

Reviewed the options available to the Ministry for meeting its IT requirements after separation from the Housing Corporation. Recommended an IT strategy and implementation procedures involved in setting up a "greenfield" operation for Tenancy Bond.

**Broadcast Communications Ltd, New Zealand
1989 - Three months**

Performed an information strategy study for this client which was about to become an independent company. Current computer systems were limited to basic financial systems and the study had to identify all major information requirements where all current procedures were manual or PC-based. The study outlined the requirements, recommended a solution and offered an implementation plan.

**ICI (NZ) Limited
1989 - Two months**

Supervised and participated in a PA team preparing an information technology strategy plan with particular emphasis on the advantages, disadvantages and consequences of trans-Tasman rationalisation of ICI's IT support.

**Auckland Farmers' Freezing Cooperative Ltd (AFFCO)
1989 - Three months**

Supervised a team of PA and AFFCO staff in preparing an information technology strategic plan for AFFCO. Assignment grew out of previous assignment where major cost reductions were identified by achieving better use of computer technology.

**Mobil Oil (NZ) Limited
1988 - Three months**

Led a team of Mobil staff in an information technology strategy study aimed at producing a systems plan for the next five years.

**Department of Social Welfare
1987 - Three Months**

Participated in a team developing an IT strategy for DSW. Work included business strategy development, functional analysis of Department activities, a review of the DP requirements, analysis of existing data systems and the creation of a Data Model for all operational data requirements, development of implementation options together with costed scenarios and project plans.

**Review of
Business
Processes**

Telecom Mobile (business unit of Telecom NZ)
2003/4 – Six months

Member of three-person team charged with redesigning the processes used to manage the supply of mobile phones to the NZ market. Successfully promoted the concept of 'lifecycle management', developed specifications, worked with internal IT staff to obtain data, worked with forecasting group and marketing team to 'sell' the concepts.

Developed a complex and sophisticated Excel-based system for workflow automation which was used for several months as an intermediate solution (before going to market for a suitable package) by approximately 20 staff to provide weekly supply requirements based on segment sales forecasts, supply constraints and promotion plans.

Provided assistance, training and support during change-over and adoption of the intermediate system.

Carter Holt Harvey Forests

1997 - One week

Assisted CHH Forests' Forest Biotechnology Centre develop methods to assess the value of their activities, and use them to establish research priorities.

NZ Immigration Service

1996 - Two weeks

Reviewed operating processes of the Investigations Branch, developed a cost model of operations so as to derive cost per unit for each process. Extended the model to demonstrate the impact of the proposed interdiction strategy, and further to forecast the effect of increased aircraft movements on the strategy to assist preparation of a business case for interdiction.

NZ Immigration Service

1995/96 - Six months

Facilitated a comprehensive review of all customer-related service delivery processes used by the Service. This involved training three teams of Service staff, facilitating them through a series of weekly workshops in order to identify current processes, redesign them, prepare cost-benefit analyses of options available for all the main processes, make recommendations and prepare implementation plans.

Specialist Service staff were co-opted where appropriate for evaluation of information technology, staffing or structural requirements.

The final reports included a comprehensive implementation strategy, particularly including recommendations for management of implementation.

The reports indicated very substantial benefits to the Service in terms of reduction in operating costs, increased availability of staff to cope with rapidly increasing workloads, and dramatically improved customer service.

**Review of
Business
Processes**

... continued

**Trust Bank NZ Ltd
1995 - Two months**

Undertook a review of the internal communications needs and processes of the Group, identified an opportunity to improve operating costs by rationalising courier/mail movement and mail sorting throughout the Group and by outsourcing those functions.

Prepared a Request for Proposals for related services, dealt with bidders, evaluated responses and prepared a recommendation for the Bank including points for negotiation before entering into a contract, advised on the contract, and assisted with negotiation.

Prepared a service level agreement for the Bank, and assisted the Bank's representative in his preparation to manage the on-going contract.

The exercise enabled a significant improvement in service performance by the Bank while achieving cost savings of about 20% in a contract worth in excess of \$1 million pa.

**Accident Compensation Corporation (ACC)
1994/95 - Four months**

Participated in a team of consultants in a large assignment developing integrated strategic plans for the ACC. Reviewed ACC's statement of purpose.

Led a team of ACC staff and facilitated senior management workshops in the review of options available for delivery of services by the ACC.

Undertook a review of the major business processes and determined options available to optimise delivery of services to stakeholders.

Assisted with cost-benefit analysis of the strategic options, and began the development of key performance indicators for the ACC.

**Education Review Office
1994 - Two weeks**

Reviewed the problems surrounding document management and manipulation within the ERO, and recommended an appropriate solution.

**Wellington City Council, New Zealand
1994 - Three months**

Facilitated a team of senior managers in order to turn the Information Services division into a Business Unit. Work involved analysis of customer need, financial analysis of the unit's operations, development of a suitable charging mechanism for the Unit, development of draft service level agreements and assisting of managers in preliminary negotiation with their customers.

Work also involved specifying internal processes required and assisting the managers implement these processes, including support systems, and the development of a strategic plan for the Unit.

**Review of
Business
Processes**

... continued

**Institute of Environmental Science & Research
1994 - One month**

Participated in a review of business processes in one division of this Institute, and maintained links between the review and on-going development of the information strategy.

**Natural Gas Corporation, New Zealand
1993 - Three weeks**

Facilitated development of specifications for a corporate business model for the Corporation, to assist with the setting of tariffs in the retail business. Reviewed tools available for the purpose, made a recommendation and assisted with negotiations before a contract was established for supply and initial creation of the business model.

**New Zealand Immigration Service
1993 - Six weeks**

Led a team of Immigration staff in a business process redesign exercise for the Appeals section. This demonstrated an expected 16% reduction in operating costs, achieved with full support of operating staff.

**Department of Social Welfare (Policy Agency)
1993 - Two months**

Developed and introduced management and operational processes and controls supporting quality management principles as required for the successful delivery of policy advice from this prominent Agency. Processes were largely project-based and work included identifying and defining standard policy projects, building work schedules, flowcharting and documenting operational and management processes.

**Telecom Corporation, New Zealand
1990 - Two months**

Led a team including Telecom staff and engineering consultants in the development of business cases for the implementation of barcoding technology into Telecom Corporation. Work involved quantifying implementation costs, identifying and quantifying benefits attributable to barcoding, preparation of formal business cases, sensitivity analysis and supporting the presentation of each case to the appropriate corporate board.

**AMP Society
1990 - Three weeks**

Participated in a feasibility study investigating options to rationalise processing costs. Contributed by developing a spreadsheet-based model, running sensitivity analyses and reporting results.

**Mobil Oil (NZ) Ltd
1989 - Six weeks**

Participated in a project team to identify opportunities to reduce overhead costs. Used the functional analysis charts developed during the information technology strategy study and identified true cost of functions and processes by analysing the chart of accounts and allocating staff numbers and overhead costs to the various functions. Identified major areas of cost and proposed appropriate means of cutting costs after interviewing staff and examining operating procedures.

**Review of
Business
Processes**

... continued

**Mobil Oil (NZ) Ltd
1987 - One month**

Undertook a review of the printing requirements of Mobil and its in-house printing facilities in order to recommend a development option.

The review involved specifying and implementing simple management control systems in the printing facility; interviewing senior Mobil staff to identify printing requirements; investigating the use of desk top publishing by Mobil; an evaluation of alternative means of forms control; and costing the development options identified.

Then investigated disposal options for Mobil's printing facilities and the cost effectiveness of using print brokers.

**NZ Department of Labour
1986 - Three Months**

Led a team of Department staff in a study of Department activities in order to specify a computer-based work management system for the Employment and Vocational Guidance Services.

Specified systems and data collection methods (including timesheet and statistical data) identified performance indicators, specified reporting formats, and implemented a pilot scheme in preparation for full operation in mid 1988.

Developed a staffing model based on performance indicators and predicted workload, calculating staff requirements by office.

**Labelmakers Ltd
1986 - Two months**

Specified job costing, production control and job estimating systems for this printer. Work included analysis of production, advising and implementing procedures to improve performance, redeveloping data collection systems (including time-sheets), training of management staff, implementation of management information systems and subsequent guidance.

**Printpac
1985 - Four months**

Specified and supervised development and implementation of production control systems for this large printing works. Also developed and implemented a computerised quote register based on a client/job database, which was then extended to become a full costing/estimating system for quoting of print work.

Work involved: training client staff, leading a full work study of the works, identification and implementation of method improvements, development of data collection systems (including timesheets), supervision of development of production control systems, training of management and assistance in improving performance.

Management of Change

Natural Gas Corporation

1995 - Two weeks

Ran workshops for senior executives of the Corporation to introduce the principles and practice of strategic management, with particular emphasis on the use of information technology.

Trust Bank NZ Ltd

1994 - Three months

Collated and reviewed the impact of a number of change projects on staffing in Regional Head Offices. Prepared an integrated model showing for each Regional Bank the changes to be expected in staffing by type of staff, timing and change project, to enable Regional managers develop staff management plans covering the period of change.

Applied model to eliminate areas of duplication and to identify gaps in the change process. Followed this model with a related one looking in detail at staffing requirements in Branches as a result of the change projects and advised on change plans.

Broadcast Communications Limited, New Zealand

1990 - Three months

Managed implementation of BCL's information strategy. Obtained detailed user specifications by running a series of workshops, estimated network and hardware requirements, evaluated packages and selected appropriate systems for a set of local area PC networks with users spread across NZ.

Assisted client staff in the development of new operating procedures, particularly for work management and the links between operating systems and the chart of accounts.

Systems specified included general ledger and accounting, payroll, personnel, asset management, job costing and work management (including data collection from workforce), interfaces, etc.

Also assisted Financial Services staff develop a new Chart of Accounts and developed specifications for the management of development and maintenance projects. Assisted the development of new procedures for the company for the use of the Chart of Accounts.

New Zealand Immigration Service

1989 - Two months

Supervised a team of PA and client staff in a cost/benefit analysis of their proposed integrated computer systems. The team had to develop work flow diagrams, sample activities to estimate average durations, analyse and extrapolate available statistics to estimate work volumes and estimate the impact of the proposed systems.

New Zealand Immigration Service

1988 - Two weeks

Led a team of NZIS staff in the development of a project plan for the implementation of an integrated computer system and estimated project costs and resource requirements for this 4 year project.

**Business
Performance
Management**

A Small Manufacturer of Metal Products

1996 - One month

Advised the owners of this private firm on issues affecting their cashflow and performance. Assisted them in setting up improved performance management processes and helped the firm to a dramatic increase in performance.

Forestry Corporation of NZ

1995 - Two months

Reviewed operating performance of FCNZ's KPP log milling plant, advised on appropriate performance reporting, and assisted management with development and interpretation of appropriate performance information. Introduced variance analysis and economic value considerations. Developed user requirements for a production management information system for the Plant.

Energy Direct Corporation, New Zealand

1994 - Four weeks

Reviewed the requirement for information by the corporate executive group to determine the need for a performance-based information system within the Corporation. Assessed the need for information by executives through interview and analysis of in-house work. Assessed the suitability of in-house tools and existing data and information systems.

Wairarapa Electricity, New Zealand

1991 - Three weeks

Contributed to introduction of a new performance management system by developing an outline corporate strategic plan, identifying the major actions required for strategic change and developing performance indicators for each individual in the executive management group.

Specified requirements for an executive information system to provide information supporting all the performance indicators.

Trans Power NZ Ltd

1991 - Three weeks

Developed strategic corporate performance indicators for the MD and the Board and integrated them with financial reporting into a comprehensive set of corporate performance reports covering all significant aspects of Trans Power's business.

Housing Corporation

1991 - Four months

Led a project team of Corporation staff in the development of performance management reports for Board, General Managers, Branch and Divisional Managers of the Corporation.

Identified decisions made at each level, developed performance indicators and extended them into a regular reporting format, detailed information system requirements, produced a sample and then the initial cycle of reports, and detailed requirements for information not currently available within existing systems.

Trained Information Centre staff for ongoing development and advised senior management on the interpretation and use of the business performance indicators.

**Business
Performance
Management**

... continued

**Auckland Farmers' Freezing Coöperative Ltd (AFFCO)
1991 - Four months**

Developed a marketing model for AFFCO to predict cash position month by month. Used model in sensitivity tests to identify methods of minimising borrowings and to identify differences between actual production and the budget in order to improve control of activities affecting cash flow.

Assisted the development of a pilot standards-based costing procedure for AFFCO, including the development of reports to support variance analysis. The pilot highlighted significant errors in current reporting procedures.

**Department of Social Welfare
1991 - Three months**

Led a team of client staff in the development of a business performance monitoring system for the Minister, the Executive Management Group and regional management groups.

Identified decisions being made at each level, determined appropriate data for each, developed performance indicators, designed report formats, assisted all recipients with the understanding and use of the reports and transferred skills to client staff to enable them to continue the production and development of the system.

**New Zealand Immigration Service
1990 - Six weeks**

Developed a fee structure for NZIS permits based on full recovery of operating costs. The fee structure was based on an analysis of activities and service volumes. Recommendations were made to improve operating performance.

**Ministry of Agriculture and Fisheries (MAFQual)
1990 - Three weeks**

Reviewed performance of an IT supplier (AWA Ltd) in developing equipment and software for the Meat Industry, under contract to MAF. Reviewed supplier specifications, costing, development methodology, project control and performance. Identified significant issues for negotiation by MAF and opportunities for cost saving.

**Broadcast Communications Ltd, New Zealand
1989 - Three months**

Developed a Business Performance Monitoring system for the executive. Measures were identified as appropriate to a project oriented development, maintenance company reports were designed and a reporting system developed.

**ICI (NZ) Limited
1989 - Two months**

Developed a business performance monitoring system for ICI and the ICI Chemicals Division. Measures were devised relating to critical success factors; report layouts were prepared; a reporting system developed and linked to the chart of accounts to allow automatic generation of management reports. Executive groups were guided in their interpretation of the results and reports modified to reflect trends identified.

**Industrial
Strategy
Development**

**Carter Holt Harvey Pulp & Paper
1996 - One month**

Reviewed current paper recycling plant operated by CHH, modelled operations of proposed plant, applied industrial engineering techniques to design an optimum configuration for the proposed plant and developed plant layout diagrams.

**Carter Holt Harvey - Kinleith Mill, New Zealand
1995 - Three weeks**

Reviewed strategic options and operating parameters and policies of the Kinleith Pulp and Paper Mill. Reviewed asset management practice and strategy, and made recommendations as to practice and information needs for effective plant management.

**BHP (Australia)
1987 - One month**

Trained staff in Wollongong in the use of Optik software in simulation applications. Used Optik to optimise plant utilisation at a slab yard and advised on the necessity for major equipment purchase at a coil strapping plant.

**APD (Australia)
1987 - One month**

Investigation into production control at an APD plant in NSW, resulting in the development of an interactive planning board using Optik software to enable APD management to test various plant configurations and scheduling methods in order to minimise stockholdings and improve their response to market conditions.

**Bluebird Foods Ltd, New Zealand
1987 - Two months**

Undertook a strategic review of operations to identify opportunities to improve profitability. The review addressed the economics of a multiplant operation, included a thorough analysis of production costs, production management and control systems and management in each plant, and an analysis of the merchandising and distribution systems.

Established effective production standards and an interactive computer-based model of operations based on a series of databases relating to company activities. Subsequently identified and estimated capital investment and operations costs of the development options and made economic and financial valuations.

**Project
Management**

**Zivo Ltd
2001 – One month**

Assisted Zivo with strategic review of a multi-million dollar bid opportunity. Project managed response to the RfP, and advised on establishment of procedures and practices that Zivo should adopt for future bids of this kind. The bid was shortlisted, and described by the prospective client as 'outstanding'.

**Department of Social Welfare - SWIFTT
1989 - Three weeks**

Worked with the SWIFTT project management to develop an overview of this large project in order to identify resource requirements and development restrictions for the final three years of the project. Also assisted in implementing internal communications and controls for all resource groups.

**Department of Social Welfare
1988 - Three weeks**

Trained DSW staff in critical path analysis and project management, and advised in initial stages of implementation of the information technology strategic plan developed previously.

**Trans Power NZ Ltd (DC Link Project)
1988 - Three weeks**

Developed a budgetary planning and control system for the DC Link Project, and specified parameters for a Project Reporting System. Assisted in the development and implementation of the system which provided all management reports for all subprojects and the main project, including financial and progress data, using payments by milestones.

**LINZ (Land Information, New Zealand)
1986 - One month**

Trained staff in project management techniques and assisted in the development of the project plan to revise and computerise land records in New Zealand. Assisted LINZ control the project, involving liaison between government departments.

**Wellington Regional Council
1986 - One month**

Trained staff in project management techniques and assisted in project planning for water supply to the Wellington region.

**Ministry of Energy, New Zealand
1985 - Three months**

Implemented a project management structure, provided management expertise and developed project plans for several major energy based projects in the Waikato region, including opencast and underground coal mining, housing and services infrastructure, and a 1 000 MW thermal power station.