
BUSINESS STRATEGIST & CONSULTANT

14+ years experience working within the context of large organizations and startups;
with a uniquely strong ability to facilitate coordination and integration across diverse groups and disciplines;
Applies Systems Thinking to problems; Exercise adaptive leadership in complex environments.

Areas of Expertise

- Strategy
 - Organizational Design/Development/Learning
 - Collaboration / Facilitation
 - Knowledge Management/Community of Practice
 - Social Media/Social Marketing
 - Systems Thinking / Modeling
 - Adaptive Learning/Leadership
 - Sustainability
 - Process Performance Improvement
 - Web-Based Technologies
- Work on **frontiers of knowledge; creatively combine ideas from different fields for the design of strategic business solutions.**
 - **Defined short- and long-term strategies** for the implementation of diverse web-based systems.
 - Facilitated **alignment between projects' collaboration needs (people) and business processes with the strategic use of technology**, thereby **improving customers' satisfaction and project performance**.
 - Developed **organizational systems concepts and prototypes**, helping customers visualize final products and provide feedback before product development, thereby **avoiding unnecessary rework and associated costs**.
 - **Combine rational analysis and intuition/perception** to facilitate understanding of complex problems and environments.
 - Often operate as a **liaison between different groups/disciplines** and **translate diverse perspectives and business languages** into a coherent framework; this usually results **in improved communication, coordination and integration** between groups/disciplines and facilitates the development of **shared goals and strategies**.
 - Conscientious **team player, who inspires trust, facilitates conflict resolution** and the development of **communities**.
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PROFESSIONAL EXPERIENCE

Soma Integral Consulting, LLC

2010-Present

Owner and Primary Consultant.

Soma Integral Consulting's mission is to facilitate the resolution of adaptive challenges by transforming and designing purposeful and conscious organizations, while focusing on the well-being of social and environmental ecosystems.

Systems Thinking Training

- In partnership with Graceful Systems, Soma Integral Consulting designed a **Systems Thinking Training for Regulatory Utility Commissioners** and their staff under a grant provided by the National Association of Regulatory Utility Commissioners (NARUC). This course was presented to regulatory commission staff and other stakeholders in both Wisconsin and Idaho in April 2011.

Leadership for Emergence Retreat

- Co-facilitated a **Leadership for Emergence** retreat with U.K. artist and facilitator Andrew J. Campbell during the summer 2010 in South of France. A 'Notes from the Field' article about the retreat was published by Integral Leadership Review, Volume X, No. 5, October 2010.

Transformative Sustainable Solutions, Inc (dba ProjectDX)

2007-2009

Co-founder, Product & Marketing Manager for DX/Stormwater and DX/Energy.

ProjectDX was a software company engaged in the development and operation of a web services platform for deploying and driving community-wide sustainability programs for energy, stormwater management, and GHGe reduction. ProjectDX platform helps mobilize residents to make changes in their personal environments/behavior, enabling them to collectively contribute to the solving of their city's infrastructure problem. Formerly owned by David Evans & Associates, ProjectDX joined Renewable Funding (RF) in January 2010. RF offers PACE (Property Assessed Clean Energy) financing for communities and their property owners to fund energy efficiency, renewable energy, and water conservation improvements to their residential and commercial properties.

Bechtel Corporation, San Francisco, CA

1998-2007

Six Sigma Black Belt, Bechtel Civil

(2005-2007)

- Supported the Dulles Corridor Metrorail Project (DCMP), Vienna (VA) in the **development of cross-functional processes** in preparation for the execution of the design-build phase.
- Completed two **Six Sigma process improvement projects** resulting in **significant cost savings**.
- Facilitated the **resolution of cross-organizational issues** between the DCMP design team, the project client and its technical consultant. (The issues related to poor performance of the design review process during phase 1 of the project.) The project team reported **significant time saving** during phase 2.

Business Analyst and Project Manager, Bechtel Information Systems & Technology

(1998 to 2005)

- **Co-developed business plans and strategies for two proposed Bechtel spin-off consulting companies.** Performed **market research**. Defined products, services and **consulting methodology**.
- Coordinated a cross-functional community of mid-level managers interested in **promoting tacit and explicit knowledge management practices** within the company. The result of our research was captured in a knowledge management strategy white paper presented to Bechtel senior management.
- Served as **Project Manager** for the development and/or deployment of diverse Web-based technologies supporting content management, collaboration, people-to-people network, and business process management.
 - **Defined short- and long-term strategies** for the implementation of diverse Web-based systems.

- Performed market research and technology comparison analysis. Assessed return on investment.
- Worked with Bechtel's internal customers to **define business needs and requirements** for the use of Web-based technologies. Facilitated **collaborative decision-making** and **integration of inter-disciplinary requirements** into a unified program, thereby improving **customers' satisfaction**.
- Coordinated systems development with the technology development team.
- Managed systems' development budget and schedule.
- Supported technology **implementation**. Provided **training and support** to end-users.

TEACHING EXPERIENCE

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| Bainbridge Graduate Institute, Bainbridge, WA | 2007-current |
| <ul style="list-style-type: none"> • Team-teaching a <u>Strategy & Implementation</u> course and a <u>Systems Thinking</u> course for the online MBA program with a focus on sustainable business. | |
| College of Environmental Design, University of California, Berkeley | 1997 - 1998 |
| <ul style="list-style-type: none"> • Taught "Introduction to <u>Design Theories and Methods</u>" course. | |

EDUCATION & CERTIFICATIONS

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| Certified Six Sigma Black Belt
Bechtel Corporation, in-house Six Sigma training program. | 2006 |
| Ph.D. in Design Theories and Methods
Department of Architecture, College of Environmental Design, University of California, Berkeley.

Dissertation Title: <u>Managing Architectural/Engineering/Construction (AEC) Project Organizations at the Edge of Chaos: An Analysis of AEC Project Adaptive Capacity from a Living Systems Perspective.</u> | 2005 |
| Master of Science in Design Theories and Methods
Department of Architecture, College of Environmental Design, University of California, Berkeley. | 1998 |
| Architecture Diploma
Six-year professional program in Architecture and Urban Planning, University of Geneva, Switzerland

Language: Fluent in French (native) and English. | 1995 |

PROFESSIONAL MEMBERSHIPS

- Member, **Discovery AE Group**, a think tank and self-organizing group of professionals - mainly architects and engineers - who collaborate to explore how their firms may respond to today's adaptive challenges such as climate change and other sustainability issues.
 - Member, **Society for Organizational Learning (SoL)**, a learning community composed of organizations, individuals, and local SoL communities around the world devoted to the "interdependent development of people and their institutions in service of inspired performance and meaningful results."
 - Member, **The Natural Step Network**. TNS is a systems thinking framework focused on the triple bottom line that aims at long-term sustainability.
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