

ROD KOCH, CMA, PMP, CSM

Syracuse, NY

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EDUCATION:

Master of Science in Applied Data Science – 2020
Syracuse University, Syracuse, New York

AACSB Bridge Program – 2019 (Audit 2020)
Association to Advance Collegiate Schools of Business (AACSB), Tampa, Florida

Master of Science in Communication, Advertising Specialization - 2017
Syracuse University, Syracuse, New York

Master of Global Management (MGM) - 2012
Thunderbird School of Global Management, Glendale, Arizona

MBA, Management Information Systems (MIS) Concentration - 1985
Syracuse University, Syracuse, New York

BS, Accounting -1981
Illinois State University, Normal, Illinois

AA, Accounting - 1981
AS, Data Processing -1980
Illinois Central College, East Peoria, Illinois

TEACHING EXPERIENCE:

PROJECT MANAGEMENT INSTITUTE (PMI), Syracuse, NY **2014 – 2018**
Syracuse, NY Chapter of the Project Management Institute

Director of Certification (2014 - 2016; 2017 - 2018)

Responsible for Project Management Certification Programs

- Organized review classes for candidates taking the Project Management Professional (PMP) and Certified Associate in Project Management (CAPM) exams. Worked with the Syracuse University Ted Center and Nancy Cantor Warehouse to schedule, organize, and deliver a multi-week series of classes taught by PMP volunteer instructors. Taught at least one course each semester and filled in for other sessions when other instructors were unavailable.

SYRACUSE UNIVERSITY, Syracuse, NY **1985**
Private Research and Teaching University

Adjunct Instructor (1985)

Adjunct Instructor in Management Information Systems

- Taught entry level Introduction to Management Information Systems course. Prepared lessons for each class, developed, administered, and graded quizzes and exams.

APOSTOLIC CHRISTIAN CHURCH, Syracuse, NY **1983 - Present**
Religious Organization

Lay Teacher (1983 – Present)

- Currently teach monthly classes for the adult age group, including face-to-face and on-line Zoom sessions. Have taught multiple age groups including Junior High, High School, and College & Careers age groups.

INVITED PRESENTATIONS:

1. IMA Northeast Regional Council Conference, September 24, 2019, "Data Analytics and the Future of Accounting"
2. PMI Syracuse Chapter Meeting, May 22, 2019, "The Future of Project Management"
3. IMA Syracuse Chapter and New York - Ontario Regional Council Webinar, December 20, 2018, "New Accounting Skills for the Digital Age Part1: Technology and Analytics"
4. IMA Northern Lights Regional Council Conference, April 20, 2018, "Are Robots Coming for my Job?"

PROFESSIONAL EXPERIENCE:**UTICA NATIONAL INSURANCE GROUP**, New Hartford, NY**2013 – 2019***Property Casualty Insurance***Project Manager** (2013 - 2019)

Project Manager for Digital Transformation and new product development projects

- Managed multiple digital transformation projects with budgets totaling over \$5.0 Million using agile Scrum methodology. Responsible for delivering projects on-time, on-budget, while maintaining positive client relations and conforming to Project Management Office standards. Managed on-shore and off-shore resources at multiple geographically dispersed sites. Presented monthly project status to the Executive Steering Committee.
- Implemented multiple Customer Care projects including Customer Care Portal, Agent Relationship Management, Unified Call Center Service Desk (personal & commercial lines), and Master Data Management.
- Managed the development and implementation of a \$2.5 million Errors and Omissions efficiency project to web-enable a straight-through price quote and application submission system tied to a back-end administrative and workflow system.
- Managed the implementation of a multi-phase commercial lines Business Owners Property (BOP) product expansion project. Implemented auto service, restaurant, childcare classes, and religious institution products.

AXA EQUITABLE/THE MONY GROUP, Syracuse, NY**1998 – 2013***Financial Services***Senior Manager - Project Delivery** (2012 - 2013); **Project Manager/Project Delivery Manager** (2008 - 2012)

Managed multiple projects with annual budgets ranging up to \$1.2 Million. Responsible for delivering projects on-time, on-budget, while maintaining positive client relations and conforming to Capability Maturity Model Integration (CMMI) Level 3 standards. Managed on-shore and off-shore resources at multiple geographically dispersed sites.

- Managed the Webtrends Upgrade Project to migrate to a new version of Webtrends and retag the corporate website in order to improve internal website traffic analysis and Search Engine Optimization (SEO).
- Managed multiple web-based self-service projects over two years with budgets in excess of \$2 million to provide AXA Equitable clients with the capability to receive electronic billing notices, process on-line loan quotes, rebalance funds, and transact other business via the AXA Equitable website.
- Managed the Social Media implementation project to allow sales professionals to use social media tools (e.g. Facebook, LinkedIn, etc.) while ensuring compliance with internal guidelines and external FINRA regulations.
- Managed the U.S. effort to improve the Major Incident Management process as part of AXA Global Solution's world-wide Six Sigma process improvement project. Improved data collection and reporting processes to increase sigma score from 2.2 to 3.0.
- Managed and delivered a project to improve web customer registration and electronic statement delivery
- Delivered a \$1 million compliance project to implement new 403b retirement plan regulations.

Lead Developer (2004 - 2007)

Played multiple roles for information technology development projects including technical management, systems analysis, coding, testing, and implementation

- Appointed to task force to improve customer satisfaction with internal technical help desk. Revised current processes which reduced outstanding incidents by 50% and improved customer satisfaction scores by 15%.
- Led the implementation of real-time and batch business-to-business interfaces with external vendors to automate broker appointments, background checks, and Anti-Money Laundering course tracking. This decreased cycle times, eliminated duplicate data, and improved compliance with legal regulations.

Strategic Architect (1998 - 2003)

Performed Enterprise and Solution Architect duties, collecting business architecture requirements, developing the Enterprise Wide Technology Architecture Plan, and working on new technology development projects to implement the Enterprise Wide Technology Architecture Plan.

- Developed the business and technical justification for purchasing and implementing new middleware software to improve MONY's distributed application architecture. This led to a \$1 million investment in this software.
- Led the technical interactive voice response (IVR) application development and systems integration effort to implement a self-service IVR system which provided fund and policy data for customers, career agents, and independent brokers via a telephone interface using a newly developed distributed application architecture.
- Investigated the business and technical implications of supporting self-service customer transactions in a "24X7" web-enabled computing environment and recommended a storage-based solution. Worked with vendors and operational personnel to determine the best solution and led the application development effort to implement this solution, resulting in a 40% increase in system availability and savings in excess of \$1 million.
- Collected and documented strategic business requirements. Led a team of architects and technologists in the development of an Enterprise Wide Technical Architecture plan. Reviewed purchases of third party software packages and new software development projects for compliance with the new architecture standards.
- Co-authored a client file architecture strategy document which identified all major sources of client information within the company and proposed a strategy to designate and develop a common customer information source interfacing with other systems via a common middleware solution instead of multiple "point-to-point" feeds.
- Proposed and led the development of a cross-platform data security architecture to control access to customer data for remote sales personnel and home office users.

NIAGARA MOHAWK, Syracuse, NY

1992 – 1998

*Electric and Gas Utility***Systems Analyst** (1992 - 1998)

Project Management and technical on-call support for electric and gas utility systems

- Led the development and implementation of the Electric Meter Inventory and Test client/server system. Developed and maintained project task lists, directed the efforts of a team of technical consultants, and worked with end-users to ensure that business requirements were met.
- Worked as the lead analyst maintaining the commercial Customer Information System with primary "on-call" responsibility for the nightly batch billing system, on-line bill correction, systems controls, accounts receivable, and the internal general ledger modules of this system.

GE CONSULTING SERVICES, Syracuse, NY

1991 – 1992

*Information Technology Consulting at Niagara Mohawk Electric/Gas Utility***Consultant** (1991 - 1992)

Business and Technical Analyst documenting business requirements and designing a Customer Information System

- Worked as a consultant on the development of a Customer Information System for Niagara Mohawk gathering, documenting, and designing the system controls and general ledger application/data architecture requirements using PC-based analysis, design, and testing tools.
- Implemented a Data Documentation System to collect meta data for the corporate data dictionary.

MUTUAL OF NEW YORK (MONY), Syracuse, NY

1984 – 1991

*Financial Services***Systems Analyst** (1988 - 1991); **Programmer Analyst** (1984 - 1987)

Team Leader for Life/Health New Business System Product Implementations and Actuarial Plan and Rate System

- Supervised a team responsible for the installation of new life and health insurance products in the new business policy issue system. Monitored task lists, project cost, and workload for a team of four to six people. Identified and implemented changes to reduce storage charges by \$25,000 per year. Investigated slow response time of on-line health system and worked with technical team to cut response time in half.
- Worked as a programmer, analyst, and project leader implementing premium and dividend calculations for new products to support billing, sales illustrations, and new business issue systems.

CATERPILLAR, East Peoria, IL
Manufacturing

1981 – 1983

Programmer Analyst (1981 - 1983)

Programmer Analyst for Automated Warehousing System Development

- Developed and integrated a new inventory application with the back-end automated warehousing system.

VOLUNTEER POSITIONS:

INSTITUTE OF MANAGEMENT ACCOUNTANTS (IMA), Montvale, NJ
Worldwide Association of Accountants and Financial Professionals in Business

2014 - Present

Global Board Member (2016 - Present)

Volunteer Leadership Committee (2019 – Present)

- Led the Young Professional Leadership Experience Subcommittee which recognizes management accountant leaders and promotes their professional growth in the early stages of their careers. Chaired the nominating committee for the annual Young Professional awards which selected and honored five global professionals.

PO&AC Audit Subcommittee (Member: 2017 – 2018); (Chair: 2018 – 2019)

- As a member and later Chair of the Audit Subcommittee, provided oversight of IMA's financial reporting, the annual 990 financial statement filing, and the external audit engagement.

PO&AC Investment Subcommittee (2016 – 2017)

- As a member of the Investment Subcommittee, worked on transitioning investments to lower cost Exchange Traded Funds (ETFs) to reduce management fees and save over \$80,000 annually.

Technical Solutions & Practices Committee Member (2014 – Present)

Researching Technical Trends Impacting Management Accountants

- Responsible for identifying and researching technical trends impacting management accountants and developing content for blog posts, magazine publications, and webinars for the IMA community.

PROJECT MANAGEMENT INSTITUTE (PMI), Syracuse, NY
Syracuse, NY Chapter of the Project Management Institute

2014 - Present

Vice President (2018 - Present)

Responsible for assisting with development of the organization's strategy and business plan

- Working with President to develop the strategy and operational business plan for the Syracuse PMI chapter.

Director of Certification/Director at Large (2014 - 2018)

Responsible for Project Management Certification Programs

- Organized multi-week review classes for candidates taking the Project Management Professional (PMP) and Certified Associate in Project Management (CAPM) exams.

APOSTOLIC CHRISTIAN CHURCH FOUNDATION, Wooster, OH
Non-Profit Foundation

1989 - Present

Board Chair (2015 - Present); **Trustee** (2010 - Present); **Representative** (1989 - Present)

Chair of the North American Board of Trustees

- Responsible for the oversight of the foundation's world-wide philanthropic projects including K-12 schools in Paraguay and Ghana, orphanages/foster homes in Brazil and Mexico, and working with our Canadian and European sister groups to support these and other missions in Argentina, Zambia, and Papua New Guinea.

GUIDE INTERNATIONAL, Chicago, IL
IBM North America User Group

1989 – 1999

Managing Director of Marketing (1995 - 1999)

Marketing Director

- Managed a group of 13 to 18 volunteers to develop and implement a marketing plan for the GUIDE organization which included a new membership drive, a targeted marketing campaign, increased use of Internet advertising, and a customer database accessible remotely by GUIDE volunteers.

Board of Directors – Treasurer (1993 – 1995)

Chief Financial Officer for a \$3 million not-for-profit organization

- Responsible for developing and tracking budget plans for a \$3 million not-for-profit organization. Worked with finance committee to reduce costs by 40% over a two-year period.
- Worked on the "alternative formats" task force to evaluate and implement programs to bring value to GUIDE customers outside of the traditional "face to face" conferences. Helped implement an audio conference program and the original GUIDE Web site.

Group Manager (1991 - 1993)

Group Manager responsible for seven technical projects

- Managed a group of 7 project managers (total staff of 24 people) coordinating 50 to 60 presentations for each of three week-long conferences held each year.
- Published the division newsletter three times a year.
- Managed a group of five geographically dispersed analysts and programmers to develop a new Windows-based session scheduling system for the GUIDE organization.

Project Manager (1989 – 1991)

Project Manager for the Common Execution Environment (LE/370) project

- Managed the Common Execution Environment project from its inception. Worked with IBM representative to plan presentations and requirements sessions for three week-long conferences each year.
- Contributing author to the GUIDE publication, "Expert Systems in the Insurance Industry".

PROFESSIONAL ORGANIZATION MEMBERSHIPS:

American Institute of Certified Public Accountants (AICPA)
Institute of Management Accountants (IMA)
American Accounting Association (AAA)
Project Management Institute (PMI)
Scrum Alliance

CONFERENCES ATTENDED:

AAA Spark Meeting – June 2020
Pepperdine Seer Symposium – February 2020
Accounting Programs Leadership Group (APLG) & the Federation of Schools of Accountancy (FSA) Annual Joint Seminar – February 2020
AAA Strategic and Emerging Technologies Midyear Conference – January 2020
AAA Transitioning to Faculty Workshop – October 2019
IMA Northeast Regional Conference – September 2019
PMI Leadership Institute Region 4 Meeting – May 2019
AAA Annual Meeting – August 2018, 2019
IMA Annual Conference & Expo – June 2016, 2017, 2018
AAA Blockchain Technology: An Emerging Issues Forum – September 2018
IMA Northern Lights Regional Conference – April 2018

PUBLICATIONS:

1. Strategic Finance, March 2020, "Technology in the New Decade", pg. 68-69, First Author
2. Strategic Finance, March 2019, "Can RPA Improve Agility?", pgs. 68-69, Co-Author
3. Strategic Finance, June 2018, "Draining the Data Swamp", pgs. 62-63, First Author
4. Strategic Finance, September 2017, "Will Artificial Intelligence Eliminate My Job?", pgs. 62-63, First Author
5. Strategic Finance, April 2017, "Cognitive Computing: Teaching Computers to Learn", pgs. 62-63, First Author
6. Strategic Finance, December 2015, "Big Data or Big Empathy?", pgs. 62-63, First Author
7. Strategic Finance, June 2015, "From Predictive to Prescriptive Analytics", pgs. 62-63, Co-Author
8. Strategic Finance, January 2015, "From Business Intelligence to Predictive Analytics", pgs. 56-57, First Author

PROFESSIONAL CERTIFICATES:

AACSB Bridge Program Completion Certificate	January 2019
CSCA (Certified in Strategy and Competitive Analysis)	May 2018
CSM (Certified Scrum Master)	June 2014
PMP (Project Management Professional)	July 2013
Six Sigma Green Belt Certification	April 2011
ITIL V3 Foundation Exam	June 2008
Siebel 7.7 Certified Consultant	January 2006
Siebel 7 Certified Consultant	May 2004
CTM (Competent Toast Master)	July 1996
ChFC (Chartered Financial Consultant)	August 1989
CLU (Chartered Life Underwriter)	February 1989
CCP (Certified Computing Professional)	May 1985
CMA (Certified Management Accountant)	January 1984
CPA (Certified Public Accountant – not licensed)	May 1981