

JAY R. ROTHSTEIN

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Strategic Sourcing of Information Technology

Recognized leader in the Strategic Sourcing and Supplier Management of Information Technology. Solid record of accomplishment as a deal maker and number cruncher in the acquisition of Software, Hardware, Services, and Market Data, especially in Financial Services. Create and negotiate contracts, statements of work, service level agreements, and cost models. Deliver cost savings, risk management, and financial integrity. Align key stakeholders, develop effective metrics, apply process controls, and lead cross-functional teams. Scenarios range from sole-source late engagement to full project life-cycle RFPs, outsourcing, insourcing, offshore and near-sourcing, Information Technology Outsourcing (ITO) and Business Process Outsourcing (BPO). Core competencies include: * **Program Management** * **Team Leadership** * **Deal Negotiations** * **Financial Analysis** * **Process Consulting**.

Experience

Barclays Capital and Others, through DK Business Solutions, TechPar Group 2009-Present
Sourcing Partner, Strategic Sourcing Manager, Procurement Lead

- For Barclays Capital, member of client-facing team supporting CIO Direct Reports for Front Office in portfolio management, vendor management, and deal execution. Delivered high-impact deals for Enterprise Shared Technology with McAfee, Chordiant, Ispirer, Persay, and Sterling Commerce. Forged a global cross-functional team and achieved cost avoidance of \$260K (100%) for software license renewal
- For an IT consulting firm, provided guidance on procurement practices on a bid to manage a \$200M RFP for IT infrastructure at a new hospital

The Bank of New York Mellon 2006-2009
Technology Procurement Officer

- Successfully negotiated deals with Bloomberg, Broadridge, EMC, HP, IBM, Infor, Thomson Reuters, and Verisign and other key suppliers, impacting 72% of \$73M touched annually (supplements available)
- Negotiated a \$5M three-year Business Process Outsourcing deal with comprehensive SLAs for health and welfare benefits, evolving from co-sourcing to a full near-shore outsourcing agreement
- Used combination of insourcing and outsourcing to achieve cost avoidance of \$1.56M (66.8%) for the \$3.2M printing of Pershing Account Kits with full SLAs and revenue opportunity of \$1.25M
- Negotiated the outsourcing of 1099 Processing, achieving savings of \$1.9M (23%) on \$7.9M and enabling 15 business groups to automate and integrate operations for the tax year
- Conducted RFP for \$1.1M in services for the upgrade of HP Mercury ITG Software, issued to HP and Wipro, a leading offshore supplier. Achieved negotiated savings exceeding 20% (not utilized)
- Developed performance metrics for successful escalation with IBM on 4000 IDX maintenance services

TechPar Group LLC 2003- 2006
Information Technology Consultant

- Facilitated restatement of financials at Fannie Mae for 2002-2004 to address accounting discrepancies of \$11B and to comply with SOX requirements
- Designed and implemented controls for integrated data warehouse project for IBM for a \$2T portfolio

Verizon Communications 1996 – 2003
Sourcing Process Leader, Senior Consultant

Procurement strategist at Corporate Sourcing supporting Internet systems and services and midrange hardware and maintenance. Led teams for costing, configuration, and reporting of major UNIX infrastructure projects

- Conducted first strategic initiative on \$90M buy of Midrange Hardware, through business plan, purchase analysis, contract integration, and supplier negotiations, consolidating 63 resellers to three OEM agreements. Managed relationships with Sun, HP, and IBM

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- Launched new segment of Internet Systems and Services: Created Business Plan and conducted procurement initiatives for E-Mail Management, Content Management, One-to-One Marketing, Competitive Benchmarking, and Internet Strategy
- As sourcing program manager for Year 2000 compliance, led a team of thirty negotiators to remediate a late-starting \$1B network-element portfolio with 1200 products and 150 companies; issued and awarded an RFP to remediate 37M lines of code in Verizon's application software portfolio
- For the critical SSNS R4 Rollout, led an \$11M quality escalation with Sun Microsystems from no response to root-cause analysis to replacement of defective boards
- For a 150-person technical organization, created and led web-based Customer Satisfaction Survey with metrics on all infrastructure groups and processes
- Developed Mid-Range Report Card Scoring Matrix for Product Quality, Service, Invoice Accuracy, Delivery, and Installation & Systems Integration
- Completed 35 deals in a single year for a total of \$34.3M included hardware, software, and services for the Verizon.com website, earning a Verizon Excellence Team Award
- Discovered long-term supplier fraud resulting in a new five-year contract with savings of \$12.3M

Mitsubishi International**1985 – 1995****Consulting Manager – Vendor Relations; Manager, Enterprise Business Systems**

Single point of contact for technology consulting and vendor relations, supporting the CIO at Tokyo headquarters, the Chairman in New York, executives at North American subsidiaries, US Lines of Business, and the Information & Telecommunications Division:

- Developed outsourcing strategies for the CIO in Tokyo for 70+ subsidiaries valued at \$750M
- Supported senior executives of North American subsidiaries in managing Big-4 systems engagements through operational audits, proposal revision, and personal consultation on Investment Support Team
- Created and operated a program for Strategic Business Intelligence for the CIO, installing fourteen on-line and CD-ROM facilities, conducting forty projects, delivering a methodology for Global Database Sourcing™, and being named to the National Advisory Board of the Gale Directory of Databases
- Launched a landmark toll-fraud lawsuit against AT&T resulting in significant cost savings and a redefinition of supplier liability
- Recommended a \$6M investment in Amtech Radio Frequency Identification (RF-ID) Traffic Toll Systems, commercialized as "EZ Pass" and now dominating the US market

Technical Publications and Public Speaking

Author of "Managing IT Procurement Risks," *EDP Audit, Control, and Security Newsletter*, 36 (3-4), pp: 13-25 (2007), also at http://www.techpargroup.com/Thought_Leadership/Managing_IT.html, Protiviti KnowledgeLeader (January, 2008), Barclays Capital Intranet site (May, 2010); 10.1080/07366980701815421

Author of "Global Database Sourcing™," *Proceedings of the National On-Line Meeting '95* (New York, NY: Meckler Publishing), delivered at the meeting

Author of "A SNOBOL Program to Solve Trigonometric Identities," presented to NASA, American Institute

Professional Affiliations & Certifications**ISM** – Institute for Supply Management**ISACA** – Information Systems Audit and Control Assoc.**CISA**, Certified Information Systems Auditor, Certification Number 0650848**Education****MA** – Linguistics*Columbia University*

New York, NY

AB cum laude – History & Lit.*Harvard University*

Boston, MA