BOLD Shift

Program & Portfolio Management for AI and Technology Modernization

THE PROBLEM

AI and modernization programs rarely fail on the technology. They stall on unclear ownership, weak governance, competing priorities and teams that never adopt the change.

Bold Shift brings program and project portfolio management to organizations running these programs, on contract and interim engagements, with deep experience in regulated sectors such as financial services, insurance and energy.

THREE WAYS TO WORK TOGETHER

Choose the shape that fits where your program is today.

Engagement	What you get	Typical shape
Interim program lead	A senior lead who steps into a stalled or high-stakes program and resets scope, owners, risks and reporting cadence	Full or part time, typically 3 to 6 months
Portfolio and PMO setup	One view of your AI and modernization initiatives, with prioritization, governance and executive reporting that hold up in front of leadership	Defined scope, about 90 days
AI adoption program lead	Planning and delivery of an AI rollout from readiness through adoption, with governance and guardrails built in and adoption measured	Defined scope, typically 3 to 6 months

TRACK RECORD

I have spent more than 20 years leading technology and transformation in financial services, insurance, energy and the non-profit sector. A few examples:

- Cut $61M from technology operating costs at Scotiabank by redesigning the technology operating model across Latin America, the Caribbean and North America, working alongside the Global CIO group.
- Partnered with the CEO and CTO at CIBC Mellon on a 3-year strategy and rebuilt board reporting so decisions moved faster.
- Led the data risk assessment audit at Kids Help Phone, from launching closed-RFP to vendor selection and onboarding.
- Earned the trust of the product executive at Coast Capital ($21B in assets under administration) and used data insights to shape the product roadmap.

HOW WE WOULD START

We begin with a short conversation and move to a written scope within a week.

1. A 30-minute conversation about what is stuck and what a good outcome looks like.
2. A one-page scope covering deliverables, time commitment and fee.
3. A checkpoint after the first 30 days to confirm the work is landing before we continue.

CONTACT

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