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Roberto Lofaro, PM/Change @ 2024-03-04
Key concept: change, with and without technology
for interviews: <https://calendly.com/robertolofaro>
latest CV update and chronological career: <https://robertolofaro.com/cv>

Current interest: Project/Program Management, PMO, Change, Vendor Management roles, organizational development

- _ Interested in FTC/temp-to-perm “mission-based” activities, remote or onsite (worked also remotely since the 1980s)
- _ since 2012 focused on “change” missions to support my publishing and data-based research activities (physical and digital)

About me: focus (management consultant and PM) on cultural/organizational change, and IT for decision support

- _ Multinational business experience: since 1986, from 1988 interacting at the Senior Management and Cxx level
- _ Worked mainly in EU+CH, some limited onsite elsewhere (Brazil, USA); also remotely worldwide (NAFTA, LATAM, EMEA, APAC)
- _ Main industries: automotive, banking/financial, gas/logistics, outsourcing, startups; also public sector as PM/BA in Italy
- _ Startups support 1990-2010: deferred equity/income to various, from 1998 mainly online startups on business+marketing planning and organizational/solution design; non-profit 2008-2010 remote USA-Rwanda from Brussels (IT vendor in India)
- _ 1986-1990: employee Andersen units in Turin; 1990-1992 Senior PM then “cadre” Compagnie Générale Informatique Milan
- _ Missions 1990-2022 via word-of-mouth in Europe, also to support/qualify prospects for partners, startups, new business initiatives, pre- and post-M&A integration, recover existing activities, sales presentations and contract negotiations with Cxx, sales BPR, organizational and capabilities development and redesign; see samples of my approach at <https://robertolofaro.com/orgsupp> and a fictional compliance program management case (200+ pages) published 2015-2018 <https://robertolofaro.com/quplan>
- _ Main business language skills (used also in negotiations/sales presentations): fluent English, French, Italian; details: see projects
- _ Previous freelance as: VAT in Italy 1990, 1993-1998 as PRConsulting; UK LTD 1998-2010; 2018 company “Change” in Turin, 2023-2024 VAT freelance as Structural Catalyst; both in 2018 and 2023-2024 the activities were a market experiment on Italy
- _ Military experience: 1985/1986 Compulsory service: Gruppo Specialisti Artiglieria Divisionale “Centauro”, artillery specialist Roles: office/service/travel management “furriere”; volunteer librarian, designed/delivered IT training for troops, NCOs, officers

Completed education after high-school (continuous on project/change/product management; since 2017 also AI/ML, SAP)

- _ 2017 Goethe Institut Frankfurt-am-Main Intensiv B1 residential course
- _ 1994 and 1995 Summer School on International Political Economy (both years A-) at London School of Economics
- _ 1994 Summer Academy on “Intercultural Communication and Management” (94/100) at Gothenburg, Sweden

Latest customer activities (main customers and employers list 1986-current: <https://robertolofaro.com/cv>)

2021 – 2022 PMO / Senior Management Consultant, CNH Industrial o.b.o. Aubay (English, Italian; limited German)

PMO Parts warehousing – FMI2Click Initiative- Langenau (DE) project

- _ BBP approval completion (Jira+Confluence) workflow, integrating with Business IT, USA, DE
- _ Support to Business SMEs during requirements collection and validation and UAT planning; Confluence-/Jira-based
- _ Coordination completion activities and new plans in support to the internal ICT reference; Jira planning/tracking
- _ From January 2022, knowledge transfer to Iveco team, support on IT+DE UAT and Go Live of Langenau project, support plan review France automated warehouse activities (decided not to join that project as PMO, resigned May 2022)
- _ For joint CNH+Iveco initiative, during phase-out delivered Jira organizational training session adapting existing course

2015 – 2018 ICT Purchasing Global PMO Consultant, CNH Industrial o.b.o. Maneat/DGS (English, Italian; limited Dutch, others)

- _ PMO and governance role on the portfolio remote fortnightly worldwide portfolio prioritization with Business stakeholders
- _ Global Supplier Scorecard: recovery of 2014 initiative, coordination w/business of completion integrating with SAP-based and other KPI information, with integration on the new Supplier Portal; feasibility future turnover KPIs
- _ Purchasing Finance (business): support to business (PMO and change) on worldwide organizational & system and process integration of Aftersales Finance, remote training coordination of Plant Financial Controllers worldwide
- _ Worldwide data harmonization support: e.g. on SAP BPC, from non-SAP to SAP and others, new plant launch in Pune (India), master data alignment SAP MDM, SAP SRM, risk D&B; also Kaizen/WCM extension, BPR on SREA (Supplier Req. Engineering Appr.)
- _ Worldwide extension of EMEA Purchasing Finance systems and processes: multi-vendor coordination, business and ICT

2012 Senior PMO / Demand Planning, CNH Industrial o.b.o. Blue Sof (English, Italian, French, limited Brazilian Portuguese)

- _ Senior PMO / Demand Planning Business Unit Precision AG&CE: recovery of initiative and transition to team, remote worldwide
- _ Brazil Management Workshop on new SAP-based roadmap for LATAM for Global CIO: support to CIO on organization from Italy, delivery in Curitiba, proceeding and results presentation in Brazil
- _ Finance EPM new platform review support; business workshops in Brazil, USA, Lugano, Turin: review of the proposed EPM solution architecture proposed by supplier, discussing requirements / criteria with key business users, with experts from supplier
- _ Support to ICT Finance manager on other initiatives (e.g. invoice dematerialization) with onsite activities in Italy and USA

Latest and ongoing publishing and data-based products (on change with and without technology – see robertolofaro.com)

- _ since 2023 working on data preparation and review for an ongoing study on political and social communication in Italy
- _ since 2023 published a search engine on AI Ethics papers published on arXiv, updated monthly (mid of the month)
- _ since 2022 worked on a data-project on the balance sheets of selected companies listed on Borsa Italiana pre- and post-COVID, selecting 237 out of the 593 on Borsa Italiana; first publication with focus on 68 companies 2019-2021 with English annual report
- _ since 2020 published curated datasets and analysis articles on UN SDGs, NextGenerationEU, and the associated Italian PNRR
- _ since 2019 published a search engine on ECB’s public communication, currently with a weekly update and dataset (Mondays)

Sample prior multinational and organizational change activities, employment, missions

2004 – 2007 Italy, part-time Partner / negotiator / key accounts manager / consultant to the CEO, Sys-Tek (system integrator) (Italian)

- _ **Hired by the CEO to help negotiate a merge with other partners**, eventually to check activities status and negotiate removal of shareholders
- _ **Supported the CEO on vendor and staffing/recruitment issues** e.g. hire/fire, vet potential technical consultants in security and networking
- _ **Key account management o.b.o. the CEO** (re)negotiating contracts with CIOs; auditing projects portfolios; monitoring billing cycle, fast close
- _ **New key and recovery projects, e.g.** for follow-up project at Denso identified potential partner on LabView to evolve existing wind tunnel software; for OMVP helped recover from non-conformity in ISO9000 due to quality maintenance software delivered, designed/led/coached BA and developers on project to add shopfloor equipment preventive maintenance; for SKF, leading completion of software projects on quality; for Arcafondi, managing technical Sys-Tek's and partners PMs on security, introducing fast close on our account/financial, and pilot projects for the CIO (Clarity and SOA-based ICT reorganization); for Banco Santander Finconsumo negotiated the outsourcing of services

1998 – 2001 France / German Switzerland - Management consultant on sales and negotiation improvement, Brio Technology / Sunnybit (French, English, German; limited Spanish and others)

- _ **Hired to help improve sales and negotiation process** (via Norwegian former country manager of Comshare in Italy), to expand efficiency and efficacy of market development/negotiations; recovered and closed contract negotiation with Manpower
- _ **From inception and fast close of negotiation with Carrefour for 24k licenses**, leading also the POC Project on assortment planning staffed with USA-based consultants, partially working in Paris
- _ **Worked with sales managers on other prospects also as POC PM+BA in various industries**, including staffing and delivering commercial presentations in French (France) and English (Spain), limited in German (German Switzerland)
- _ **In support to the German Switzerland partner Sunnybit, acted as POC PM**, with key customers in e.g. banking (Credit Suisse: retail-controlling on ICT expenditure dashboard, management reporting and customer risk reporting datawarehousing; private- KPIs) and retail (EPA); POC projects in finance (SWX), manufacturing (ABB), pharma (Roche)

1998 – 2011 support on business/marketing planning and product/solution architecture to startups (English, Italian)

1993 – 2003 market development support in Italy, France, UK to business software publishers (English, Italian, French)

1992 – 1997 Italy for Italian/French/Dutch multinational - Part-time management consultant on decision support systems, financial controlling and management reporting to the CFO/COO, with pre-M&A activities, Novogas/Liquigas (Italian, English)

- _ **Activities on Decision Support System model design**, first on logistics investments optimization, then multinational financial reporting and reclassification (as the company was Italian, but with reporting lines to France and Netherlands)
- _ **In December 1992 agreed to become financial controller from 1993**, but then instead stayed as consultant to CFO/COO until 1997
- _ **Pre-M&A activities (as Novogas acquired Liquipibigas from privatization, and the Liquigas brand)**, in loss&recover postings and accounting practices adopted by Novogas branches, leading an accounting team and reporting to CFO/COO

1990 – 2006 Italy - Management consultant on cultural and organizational change, and post-M&A integration, Cedacrinord/Cedacri (banking outsourcing/BPO, reporting to the CEO; 1990-1992 o.b.o. CGI, Compagnie Générale Informatique) (Italian, English)

- _ **1998-2006 Management Consultant reporting to the Direttore Generale on post-M&A integration missions**: organization redesign, intragroup financial flows and product/service portfolio assessment, introducing processes; feasibility studies on creating certification authority as per ISO27001, SOX-based governance, etc; proposed and Business/Marketing planning for a UK branch on risk
- _ **1993-1996 direct Management Consultant reporting to the Direttore Generale on a program to deliver cultural and organizational change**: designing and delivering multi-vendor training curriculum and associated communication, target managers, project managers, business analysts; strategic projects selected by the Direttore Generale (e.g. coordination of supplier for ISO9000 certification, new businesses/systems)
- _ **1990-1992 for CGI- started as a 5-days custom training to discuss methodologies**, derived from their prior use of PACBASE and PACTABLE (two software packages provided by CGI), developed a multi-year mission on cultural/organizational change with training to BA, PM, managers

1990 – 1992 Italy (and limited abroad) French multinational - Head of Training and Methodology in Italy, Compagnie Générale Informatique (French, Italian, English; limited others)

- _ **Initially hired as Senior Project Manager** to deliver methodology training in Turin, then cadre/IP in Milan
- _ **From July 1990, assigned to develop business unit in Milan and Italy**, liaising with Paris (HQ) and UK (Yourdon), with meetings locally in Paris and UK, and delivering localization of MERISE and then also Yourdon, plus associated change services
- _ **Developed, recruited, coached PMs, and delivered direct marketing initiative targeting corporate** to sell methodology and change services

1988 – 1990 American multinational- Product specialist and pre-sales consultant Andersen Software and Comshare (English, Italian)

- _ **Trained in London** and on-the-job on business negotiation and selling to senior management Decision support systems projects
- _ **Developed and delivered training curriculum** on decision making and **designed/delivered/audited DSS models** with senior management

Data research and publication activities on change/digital transformation/sustainability/ESG since 1990

- _ **2018-current curating and publishing datasets about change**, <https://kaggle.com/robertolofaro> and <https://github.com/robertolofaro>
Designed and released new datasets covering mainly sustainability, EU, and Italy (see <https://robertolofaro.com/datasets>), including **GDPR**
- _ **2013-current publications on change**, [paperbacks on Amazon](https://paperbacksonamazon.com), [digital on Leanpub.com](https://leanpub.com), see robertolofaro.com/published for downloads
Currently preparing further books on change and digital transformation/impacts while transitioning from OGC to PMI methods/standards
- _ **2008-2012 publications on change for customers and business audience**, including a book for a customer on integrating social networks within the corporate marketing mix, target marketing directors of their customers
- _ **2003-2005 E-zine on change for senior management** (www.businessfitnessmagazine.com), with over 800 subscribers (managers and senior managers) across more than 500 companies in Europe, part of a marketing initiative to return to Italy planned for 2004-2005
- _ **1990-2003** only to carry out research project whose results were then used in activities with customers/partners or private publications
- Current tools**: Office, Project 2019, Jupyter (basic R and Python plus documentation production), Jira/Confluence, GoogleDocs, various data tools (e.g. SQLite) to support my publications and data-centric projects on robertolofaro.com and kaggle.com / github.com
- Main online business profiles (older first)**: since 2004 LinkedIn; since 2008 Joinup; since 2011 projectmanagement.com; since 2014 EmpireKred and GitHub; since 2018 Kaggle; 2023 PMI (been part of review of The Standard for Program Management 5th ed.)
- Memberships**: since 1989 Mensa; 1997-2018 IEEE; 2015-2018 e-estonia (2016-2018 also Estonian chapter of ISACA)