

BO WARBURTON

Enterprise Information Management
OpenText Content Server

Bo Warburton is the CEO of Supai Systems, a boutique professional services firm, and a well-known business consultant, account executive, and project manager in his field. His specific expertise is Enterprise Content Management (ECM), particularly OpenText Content Server, formerly known as Livelink. In past roles he has managed software product development, sold enterprise software, and led men as a .com COO, pre-sales engineer, and U.S. Naval officer.

Mr. Warburton loved Livelink at first site in 1996 because he saw that it was an integrated, Web-based platform. He joined OpenText as a professional services manager in 1997, later designing implementation methodologies and authoring process guides for business classification using community, information, and security (CIS) models. He has been involved in over 100 Livelink implementations or systems integration projects and is an active member of AIIM. He founded Supai Systems in 2005, which has grown to 20 staff and \$1.2 million revenue in 2012, delivering elegant, affordable Livelink solutions to 50 clients worldwide.

Professional Summary

- 15 years OpenText Livelink ECM versions 7.0 to CS10
- Software professional with 18 years total IT experience
 - ✓ Project management
 - ✓ Executive management in a startup
 - ✓ Operations management
 - ✓ Opportunity analysis and venture capital experience
- Stakeholder interaction, requirements analysis, and solution design
- Information architecture and taxonomy development
- Business process design and workflow implementation
- ECM project definition, planning, and management
- Training and change management planning and execution
- Familiar with document management in many domains
- Extensive international business and personal experience

Employment History

- Managing Director, Supai Systems: 2005-present
- Director, Alliance Management, OpenText: 2002-2005
- Vice President, Engineering, GetThere.com: 2000-2001
- Services Manager and Solutions Consultant, OpenText: 1996-1999
- Business Analyst, American Management Systems: 1993-1996
- Ensign to Lieutenant, U.S. Navy: 1986-1991

Livelihood Training

- Knowledge Fundamentals
- Workflow Design I, II, and III
- Livelihood Forms—Design and Implementation
- Records Management and Physical Objects
- Governance Workshop
- ECM Strategy—from Vision to Implementation
- Builder and LAPI Fundamentals
- WebReports Design I
- Advanced Schema and LiveReports
- Troubleshooting Workshop
- Architecture Workshop
- System and Search Administration

Other Training

- Oil and gas industry basics, Encana: 2010
- FDA-regulated controlled document management, Celgene: 2009
- Project management (Kepner-Tregoe), OpenText: 1997
- Java programming, CSC: 1996
- Structured analysis/structured design, AMS: 1993
- Relational database concepts and data modeling, AMS: 1993
- User interface design, AMS: 1993
- Leadership and management, USN: 1986

Technical Skills

- System requirements and test case specification and design
- Basic HTML, JavaScript, SQL, XML, and XSLT
- OpenText Content Server system design

Education

- Master in Public Policy, Harvard Kennedy School, 1993
- Bachelor of Arts *cum laude*, Folklore and Mythology, Harvard College, 1986 (special field: China)

Boards, Awards, and Honors

- AIIM Certified Information Professional, 2012
- AIIM SharePoint Certified Practitioner, 2011
- AIIM Nevada Chapter President, 2009
- AIIM ECM Certified Specialist (ECMs), 2008
- Livelihood Certified Consultant with distinction, 2001
- Navy Achievement Medal (two awards), 1989-1991
- Basic Naval Parachutist, 1984

Project Examples and Professional Highlights

Content Server redeployment—oil & gas

A new refinery in the Alberta industrial heartland needed to redeploy Livelink and upgrade it to version CS10 as the document package for this major capital project. Previous attempts to build infrastructure, establish a vision, automate processes, and define CIS models had failed to deliver a working platform. Mr. Warburton was the leading expert on this product, bringing to bear his extensive experience with the product and with information management in oil and gas. The team deployed and upgraded Livelink successfully, delivering user interface enhancements and workflows that received high marks from business and technical stakeholders, including those associated with external engineering, procurement, and construction contractors.

Livelink findability—oil & gas

A major with offices in Canada and the U.S. needed to make it easier to find and use millions of engineering and compliance related documents in a mature Livelink implementation. Working as lead business analyst and project manager, Mr. Warburton led the effort to attach metadata to the documents and develop a customized search capability based on WebReports. The project lasted about six calendar months, came in under the original \$50,000 budget, and was hugely successful among the user community.

Mr. Warburton has planned many other kinds of IT projects using Livelink, including: initial installations, upgrades, workflow deployment, communities of practice, enterprise library management, knowledge management, and records management.

Livelink project definition and planning—pharmaceutical

A large pharmaceutical company acquired a smaller partner and needed to integrate two enterprise Livelink instances. Mr. Warburton wrote the charter, wrote the plan, and executed the integration while satisfying diverse stakeholder needs over nine months. He defined architectural viewpoints, overcame severe technical hurdles, and worked with individual business units to integrate their business and content operations. The client realized over \$300,000 in savings without interruption in operations.

Livelink workflow design and development—financial services

The financing arm of an automobile manufacturer purchased Livelink to replace paper process with business process management for purchase requests and invoice approval. Working with users from the accounting department and technical staff in IT, Mr. Warburton designed and implemented workflows, form templates, database structures, HTML views, user interface improvements, and instructional guides. The project went live as scheduled and is in production today.

ECM vision and roadmap—real estate

A real estate management company found that its implementation of Livelink ECM was faltering and engaged Mr. Warburton to assess the technical and organization situation. He interviewed stakeholders and introduced the client to best practices in the construction of an ECM vision and roadmap using Livelink. The clients implemented his recommendations and were able to revitalize the ECM implementation.

Information architecture and CIS modeling—oil and gas

An oil refinery purchased Livelink to use across the enterprise to store and manage engineering documents, support work-order management for maintenance, safety, and inspection response, and implement records management. The company needed to design its foundational CIS models to support the large deployment in phases. Mr. Warburton, a thought leader in the field, reviewed records, conducted interviews, and guided the company through several iterations to design and implement an effective hierarchical subject matter classification scheme. He conducted workshops on best practices in permission modeling and community management and worked to adapt years of experience to the specific needs of the energy industry.

Entrepreneurship and business development

After years of working with Livelink from the inside, Mr. Warburton left OpenText to address the severe shortage of Livelink software engineers as an external partner. He started a consulting boutique in 2005 in order to bring new consultants into the field and improve the quality of Livelink project work. Supai Systems now has 17 trained Livelink engineers on staff in India, open slots for hiring four more in America, and a history of delivering over \$5 million worth of professional services during 50+ project engagements with 40+ clients.

Startup executive

A Las Vegas dot-com in the travel and hospitality space recruited Mr. Warburton as a member of the senior management team. The company, AllMeetings.com, became part of the GetThere line of business within Sabre after two acquisitions. As VP Operations, Mr. Warburton transitioned the e-commerce development and delivery environment from Microsoft-only to J2EE in a professionally hosted environment. He transitioned product management processes from word-of-mouth to specification-driven release engineering using eXtreme Programming concepts and transitioned QA methods from ad-hoc testing to comprehensive defect tracking based on use cases and Mercury tools.

Technical sales

A technical sales consultant at OpenText is responsible for matching business problems to off-the-shelf and custom solution proposals in

order to win business and retain clients. This is a hand-on role developing prototypes using Web tools, XML, JavaScript, LiveReports, and OScript. Mr. Warburton provided installation and trouble-shooting services and training for clients and colleagues in community modeling, user interface improvement, and ECM system design.

Venture capital/management consulting

Mr. Warburton has had occasion to review and evaluate business plans as a consultant to a venture capital fund and as an alliance manager with OpenText. In the first case, he evaluated business proposals from the perspective of return on investment in technology; in the latter, potential of a partnership.

Business systems analyst

Mr. Warburton started his IT career with American Management Systems (AMS) after graduate school in 1993. At AMS he learned and traditional software development methodologies, acquired technical knowledge, and practiced project management techniques specific to software development.

Leadership and management in the U.S. Navy

Serving as Ensign through Lieutenant on two shipboard commands, Mr. Warburton managed divisions of 6-23 men. He qualified as Basic Naval Parachutist, Engineering Officer of the Watch, Officer of the Deck, and Command Duty Officer. He was twice awarded the Navy Achievement Medal personal citation and was selected for advancement to Department Head.