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Gary Gershon

Overview

Mr. Gershon brings to his clients three decades of management and information technology experience in document management and workflow systems, application design and programming, and business process integration. His experience has grown from work with leading technology, insurance, and financial services organizations, including fifteen years with IBM and fifteen years as a successful consultant. He is an expert on SOA applications of ECM and content-enabled vertical applications.

As a senior manager for KPMG Peat Marwick Advanced Technology, he established new practice areas in imaging, workflow, and communications technologies. His practice offered management consulting services to advise organizations on the strategic applications that support insurance, financial, accounting, and high-volume workplace systems.

As Vice President for Services for CTG, he developed practices in leading e-Business areas including ERP and CRM to support B2B, B2C and B2E web solutions.

With IBM he worked with enterprise mainframe systems as well as distributed processing, server, and workstation solutions. Mr. Gershon provided technical design and system support for IBM's insurance and financial services customers in the Northeast. He served for four years as manager and Editor of the *IBM Systems Journal*, a highly regarded international technical quarterly.

His current focus areas include SOA business process integration using XML Web services, as well as WebDAV and other standards-based document solutions. These XML-based technologies permit workflow and document systems to integrate with business with independence of vendor-specific APIs. Gary has led success projects in WebDAV-enabling multiple legacy client/server and mainframe systems and repositories, and designing and implementing Web service and MQ service business processing integration applications.

He has developed Internet and client-server application object models, frameworks, and implementations using J2EE and .NET to minimize development effort and improve maintainability for document management and workflow applications. His commercial document

management workflow analysis product, *Route Analyzer*, has been a productive tool for a number of large corporations.

Mr. Gershon's clients include major companies in the financial services, insurance, and the high technology industries, including Goldman Sachs, Citibank, Prudential, Chubb and Son, Eastman Software, and IBM.

Significant Projects

Mr. Gershon and accomplished a significant number of projects involving the application of new technologies to solve organizational problems, particularly those of document management workflow, and work management. In recent years, these have focused on SOA business process integration and the use of standards and Internet systems to provide business solutions within and between companies.

Chubb and Son Service-oriented Architectures



Designed solution and led development team on SOA and XML-based applications using Web services and MQ services to support multinational underwriting processes as a Content Enabled Vertical Application (CEVA). Designed XML schemas, parsing, persistence and object management for Domain Specific Language (DSL) definitions and specification of product composition and business rules.

Designed and developed a successful Business Process Execution Language (BPEL) implementation for handling business process orchestration needs for Multinational Resources Group at Chubb.

Designed, prototyped, and led the developed team for a document indexing application for browser-based users using a "Rich" client. The client supported send-to, drag-and-drop desktop indexing using XML Web Services and WebDAV to provide vendor-independent access to business systems and document repositories.

Integrated the eReinsure.com platform with Chubb's WebDAV document repository to support this inter-organizational workflow. Utilized B2B encryption and PKI security.

Provided mentoring, consulting, and design guidance to other Chubb application areas on XML Web Services for Business Processing Integration using J2EE and .NET technologies.

Designed and led the development team for the implementation of an MQ-Series messaging based document filing application to allow mainframe and other business systems to file documents asynchronously of the availability of the document system itself.

Chubb and Son Enterprise Document Management



Engaged by Chubb and Son to perform an enterprise document management analysis for the purpose of replacing multiple aging departmental document systems with a vendor-supported solution with scalability and the ability to meet the varied functional needs of several core and representative business units.

Subsequently engaged to oversee the planning, installation, and configuration of the vendor solution that was adopted as an enterprise document management solution and integration with Chubb's security and application systems.

Planned and executed a full migration of the mainframe-based and server-based document inventory (10 million documents) to the new system.

Provided mentoring, design, and critical component coding for Chubb application developers to modify their applications to utilize the new system.

Westfield Group



Provided technical and business leadership in a significant project to assess the role of role and value of content and workflow management in a property and casualty business across underwriting, claims, and all other home office functions. Generated a comprehensive requirements document, project and integration plan, business justification, and executive presentations to successfully move the project into approval and acquisition phases.

IBM Global Services Chubb and Son Commercial Underwriting



Provided subject-matter-expert (SME) consulting on document management and workflow on the IBM Global Services engagement to build the Commercial Underwriting Workstation (CUW) application at Chubb.

Integrated the CUW with IBM's Visual Info (Content Manager) product to provide document access and indexing from within the same business application as the underwriting staff used for business data and linkages.

IBM Global Services Prudential



Provided design, mentoring, and integration services for a number of projects at Prudential in Roseland NJ and other centers that involved the Eastman document and workflow solution.

Integrated automated filing of documents from business systems into the Eastman system.

Designed and implemented a work assignment module to execute business rules for new work arrival, incorporating a data base of vacation and other non-availability times for processing specialists.

Integrated the workflow component of Eastman with mainframe application systems to create workflow items to handle processing exceptions with manual resolution would be required

Provided document and workflow integration design and programming for an integrated desktop for policy servicing.

IBM Global Services Equitable Life



Provided subject-matter-expert (SME) consulting on the IBM Global Services Engagement to design a comprehensive solution for Equitable's service centers.

Performed educational sessions, studies, and analysis at Equitable's New York, Charlotte, Des Moines, and Fresno centers to develop consolidated document and workflow requirements.

Prepared workflow and document management requirements documentation and matrices to create the acquisition RFP.

Participated in the vendor evaluation and selection process and organized demonstration projects for prime solutions.

Provided application design and implementation guidance for the selected solution (FileNET).

**Wang Software
USF&G**

Designed and implemented a workflow document matching application for the Wang workflow system used for subrogation at USF&G insurance in Baltimore.

**John Hancock
LTC
Empire BC/BS**

Provided consulting and design services for John Hancock's long-term care unit for case management document storage.

Provided analysis services using my RouteAnalyzer product for Empire workflows used in medical and dental claim workflows.

**IBM Global Services
New York Life
Sigma Imaging
Systems and Unisys
Corporation**

Provided IBM Global Services with subject-matter-expert consulting on developing an RFP solution for New York Life's operations centers. Developed product specifications for the development of Sigma Imaging System's workflow and document products. Produced documentation and training materials for their workflow offerings. Taught a series of classes for customers and integrators on system integration of workflow and document systems with mainframe and other enterprise systems. This work was separately customized for Unisys in Bluebell, PA, which utilized the Sigma products in an OEM relationship.

**Awards and
Certifications**

- AIIM Master of Information Technology
- AIIM EmTAG Emerging Technologies Committee
- IBM Certified Specialist in MQSeries middleware for Business Process Integration
- IBM Records Management SOA integration
- ICCP Certificate in Data Processing (CDP)

Publications

- Developed a number of workflow, document management and other publications and articles under contract with leading industry vendors.
- 2004 AIIM E-Doc Magazine September/October 2004 – *Web Services*. Web services for integrating our content management, workflow, and business systems.
- 2005 AIIM E-Doc Magazine May/June 2005 – *Documents on the Desktop*. How one financial services company uses Web services, WebDAV, and Rich Clients to index and store desktop-created documents.

Standards

- Active member of AIIM iECM Initiative for interoperable enterprise content management
- Expert member of JSR-283 standards group for *Java Content Repository* processing
- Created the AIIM WebDM Forum under the AIIM Standards Organization to facilitate discussions on web-based document solutions.

Seminars

- 2001 AIIM National Conference – Internet Standards for Document Management (WebDAV)
- 2005 AIIM National Conference – Case Study: Putting WebDAV, Web Services & Rich Clients to Work
- IBM, KPGM Peat Marwick, and other conferences – Document management, imaging, workflow, object-oriented systems design and development, workplace engineering, EDI, and inter-organizational systems

**Professional
Associations**

- Institute of Electrical and Electronics Engineers (IEEE)
 - Association of Computing Machinery (ACM)
- Association for Information and Image Management (AIIM)
Beta Gamma Sigma honorary society
Computing Practices Advisory Panel for the ACM
ACM Chapter Chairman

Education

Rensselaer Polytechnic Institute, BS, Electrical Engineering
Syracuse University, MS, Computer Science
New York University, MBA (with honors)