



**Mishkin Berteig**

**Agile Management and Software Development Methodology  
Consulting and Coaching**

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## **EXECUTIVE SUMMARY**

I lead, mentor and coach teams and organizations using agile methodologies including RUP, Scrum and Extreme Programming. I have served as a project manager, a senior consultant, a mentor, a methodology consultant, a senior software architect and a team lead on various projects, mostly in the financial services industry. I have 14 years of professional experience. I currently work exclusively through my consulting company, [Berteig Consulting Inc.](#) anywhere in North America.

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## **SKILLS OVERVIEW**

- Agile Management and Software Development with Extreme Programming, Scrum, RAD and RUP
  - Mentoring, Tutoring and Training Delivery for both technical and non-technical subjects
  - SEI's Capability Maturity Model (CMM) including Organization Process Definition, Mentoring and Peer Reviews
  - Project Management including Project Planning, Risk Management and HR Management
  - Object Oriented Software Architecture and Engineering in Java/J2EE and C#/.NET
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## **SELECTED WORK EXPERIENCE IN-DEPTH**

- **Berteig Consulting Inc.** Toronto, ON  
2004 September to Present, Agility Consultant

Berteig Consulting Inc. is a small consulting organization which specializes in providing Agile management and software development methodology consulting and coaching to large financial services organizations. Berteig Consulting can be found online at [www.berteigconsulting.com](http://www.berteigconsulting.com).

- **Project - CapitalOne DMC Lean/Agile Coach**  
Assist CapitalOne's DMC division to adopt Lean/Agile principles, practices and tools through team and organizational coaching. Work closely with two other coaches to develop and deliver Lean/Agile training covering Scrum, Lean, User Stories, Team development and project launch. Contract through [CC Pace Inc.](#)
- **Project - CapitalOne CTM Lean/Agile Portfolio Staffing/Scheduling**  
Assist CapitalOne's CTM division to develop a project portfolio staffing and scheduling process based on Lean and Agile principles and practices including pull-based queueing, appropriate process metrics, monthly process improvement iterations, and information radiators. Worked with [Mary Poppendieck](#), author of "Lean Software Development". Contract through [CC Pace Inc.](#)

- **Project - CapitalOne Strategic Technology Lean Time-to-Market Analysis**  
Research, analysis and recommendations based on Lean and Agile principles to assist CapitalOne improve its internal time-to-market for IT projects. Report and recommendations ultimately delivered to Gregor Bear, CIO of CapitalOne. Worked with [Sanjiv Augustine](#) author of "Agile Project Management" (forthcoming). Contract through [CC Pace Inc.](#)
- **Solution Architects Inc.** San Francisco, CA  
2002 March to 2004 September, Senior Architect  
2001 January to 2002 February, Architectural Advisor(occasional)  
2000 June to 2000 November, Senior Architect

Solution Architects Inc. is a consulting organization which specializes in providing senior and lead staff on enterprise software development projects. Solution Architects can be found online at [www.solutionarchitects.com](http://www.solutionarchitects.com).

- **Ongoing - Process and Methodology Advisor**  
Advise the President and the COO of Solution Architects Inc. on the advantages and disadvantages of various processes and methodologies (including RUP, RAD, Scrum, Extreme Programming and other agile methods) in order to assist in making proposals to various clients and potential clients
- **Ongoing - Business Development Assistant**  
Work with the COO of Solution Architects Inc. in the development of the sales pipeline including pitching potential clients, preparing sales presentation materials, customer relationship management, strategizing new leads
- **Ongoing - Human Resources Assistant**  
Work with the COO of Solution Architects Inc. to develop a hiring pipeline including web searches, job site searches and postings, reviewing resumes, screening candidates and conducting interviews
- **Project - .NET/J2EE Integration Proof-of-Concept**  
Manage a small team to quickly develop a proof-of-concept integrating WinForms and ASP.NET clients via ADO.NET with J2EE web services
- **Project - Schwab Integrated Testing System**  
Mentor and assist a senior engineer in the creation of a UML use case model and in the writing of use cases on a RUP project
- **Project - Wachovia Asset Classification**  
Mentor and assist a small team including the Senior Software Architect in the adoption of various process techniques from Scrum and Extreme Programming including daily status meetings, test driven development, and continuous integration. Mentor and assist the team in software architecture and design by working through problems with them often employing the Socratic method. Assist the team with implementation.
- **Project - Schwab New Broker Desktop**  
Train and mentor a team including the Technical Director to use agile methods from Scrum in a RUP project including daily status meetings, weekly iterations, iteration planning meetings, test driven development, continuous integration, constant communication with end users and business analysts, and team sharing a room. Assist in software architecture and development work for early iterations.
- **Project - Schwab Desktop Proof-of-Concept**  
Lead a 13 person team in both methodology and development using techniques from Scrum and RAD including daily status meetings, daily builds, continuous quality assurance, and dynamically prioritized requirements. Technical mentoring included software architectures with web services, .NET and J2EE. Participant in developing an RFP and evaluating proposals for a several million dollar project.
- **Presentation - Schwab and Agile Methodologies**  
Prepare and deliver an in-depth presentation on agile methodologies and software craftsmanship including Scrum, Extreme Programming, RUP, and RAD for the CIO of

Schwab, Geoff Penny.

- **Project - Schwab Capital Markets Test Harness**  
Manage a team of four in the development of an automated functional testing system for a highly distributed message-based trading system. Prepare a proof-of-concept prototype. Create a software architecture document. Mentor the development organization in automated regression testing, test driven development and refactoring.
- **Presentation - Schwab Capital Markets and Extreme Programming**  
Prepare and deliver an executive-level report on Extreme Programming for the CIO of Schwab Capital Markets, Rich Freyberg.
- **Project - Schwab Capital Markets RUP Introduction**  
Work with another process engineer to customize RUP artifacts (requirements, use cases, design) for a fast moving "cowboy" development organization. Evangelize and mentor the adoption of RUP practices including iterative development, UML, continuous quality assurance, inception, elaboration, construction and transition phases instead of waterfall stages.
- **Project - Schwab Frameworks Optimization**  
Hands on frameworks optimization and development work using profiling and refactoring.
- **Project - Schwab Course Instructor**  
Deliver a five day course to a class of approximately twenty software developers. Develop the course from the 0.9 version to the final 1.0 version. Manage the setup of a classroom with the facilities vendor, prepare course materials.
- **Project - Schwab Workflow and Imaging**  
Develop the system architecture and a software prototype for a high availability distributed imaging solution on a RUP project. Collaborate with the business and technical stakeholders to determine the requirements that affect the system architecture. Evaluate imaging, workflow and messaging products by examining documentation and APIs.
- **Project - Schwab Strategic Java Frameworks**  
Participate in a steering committee for setting organization-wide standards for the use of messaging middleware. Design and develop a Java Messaging Service (JMS) implementation over Tibco's Rendezvous messaging middleware with certified messaging and distributed queue capabilities. Design and develop a framework for bridging between two JMS "realms". Participate in code reviews, refactoring work.
- **Project - Schwab Strategic Java Frameworks Build Environment**  
Set up Win32 and Solaris build process for frameworks including automatically generated makefiles, procedural documentation and source repository management.

**Processes:** SCRUM, Extreme Programming, Rational Unified Process, use cases, test driven development, refactoring, iteration/sprint planning, mentoring, requirements management, standards development, frameworks development, object oriented design, build process definition, code reviews.

- **MyMIND.net Inc.** Elmvale, ON  
1997 June to 2002 June, Founder

MyMIND.net Inc. is an e-Learning startup based upon the principle of full community participation and universal access. The bulk of the work in MyMIND.net occurred between Sept 2000 and July 2001 during which time there were two full time employees, a contractor and several advisors and lesser participants. MyMIND.net has not been operating since mid-2002 due to business failure. I personally funded MyMIND.net in the amount of approximately \$100,000. Despite the financial loss, someday I hope to try again (and of course make all that money back, and much more!).

**Responsibilities:** All levels of business and technical management and implementation. Interviewing, hiring and other HR responsibilities. Work with advisory board and shareholders to plan and execute corporate strategies and partnerships. Investigate, initiate and maintain partnerships. Determine outsourcing needs and monitor outsourcing work. Create a business plan and marketing plans

including financial projections, positioning, and advertising campaigns. Manage and lead a small team (3 people) for web application development. Create system architecture, detailed design and some development work.

**Processes:** product development, project initiation, requirements analysis, object oriented architecture and design, technology evaluation, risk assessment, testing, coding standards, status reporting standards, XP (extreme programming), version control standards, marketing planning, project scoping, etc.

**Technologies:** J2EE (JSP, JDBC, EJB, XML, Servlets), Struts, PostgreSQL, Tomcat, apache, FreeBSD, RedHat Linux, Dreamweaver, Photoshop, cvs

**Results:** the [Oomind Education Community](#) web site based on JSP and Struts technology was launched in April 2001 (and now is defunct). Partnership established with content provider. Initial phase of market testing completed. Currently suspended due to financial constraints.

- **InSystems Inc.** Markham, ON  
2001 September to 2002 January, Software Architect at InSystems Inc.

Although at InSystems for only a brief time, it was critical for my professional development. Here I was given the latitude to implement an Extreme Programming process in a brand new project. I worked with the person responsible for methodology as well as the project manager, the director of product marketing and the business analyst. I successfully pitched these four key stakeholders on the use of agile methods, and specifically extreme programming. The project, a web-based authoring tool for insurance interviews for which I was also the architect, included a multi-tier architecture, document management, and a rules engine. I successfully introduced many Extreme Programming practices through presentations and mentoring: test-driven development, pair programming, iteration planning, user stories, continuous integration, and release planning. Unfortunately corporate standards did not facilitate the team being in one room, nor having a customer on the team full-time. I was also able to make adjustments to the standard Extreme Programming method to include a usability expert in the process as well as a more traditional architectural review aspect. After I left the project, I was able to confirm that the Extreme Programming process continued successfully through two major releases and many iterations.

**Responsibilities:** Lead team in organization's first attempt using Extreme Programming agile methodology. Create software architectural for the authoring tool developed in a team using extreme programming. Develop system architecture for "Relationship Repository" a dynamic database of configuration data. Develop an accepted proposal for internationalization (I18N) standards for InSystems' software products. Evaluate and compare Together Control Center and Rational Rose UML tools.

**Processes:** Extreme Programming with three week iterations, pair programming, user stories, test driven development, refactoring, iteration and release planning.

**Technologies:** J2EE (JSP, EJB, XML, Servlets, JDBC), JBoss, JESS Rule Engine, UML, Together Control Center, Rational Rose.

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## WORK EXPERIENCE IN-BRIEF

- 1998 January to 1999 February Senior Consultant for Platinum Technology (now part of Computer Associates)  
**Activities:** mentoring, peer code reviews, SDLC methodology contributions, requirements analysis, OO design and development, GUI design, frameworks development, tool evaluation and selection, legacy integration
- 1996 - 1997 Software Architect for Q-Soft Inc., Calgary, AB.  
**Activities:** technical team lead, ultra-agile software development, customer demonstrations and presentations, object oriented design and development, GUI design
- 1996 April: Accounting Software Development Contract for Robert Reimers Enterprises, Inc. in

Majuro, Republic of the Marshall Islands

**Activities:** requirements analysis, programming

- 1994 May to September: Lab Assistant for the Alibaba Computer Laboratory at the University of Saskatchewan  
**Activities:** coding, system administration
  - 1992 September: Database Programming Contract for the Saskatchewan Human Rights Department in Saskatoon, SK.  
**Activities:** contract negotiations, requirements analysis, design, implementation and documentation
  - 1992 August: Computer Software Training Contract for Keyano College in Fort McMurray, AB.  
**Activities:** one-to-one training delivery
  - 1991 May to August: Consultant with the Department of Computing Services, University of Saskatchewan.  
**Activities:** public relations, troubleshooting, writing informational and training materials
  - 1986 - 2002: Tutoring all ages of students in mathematics, computer science, chemistry, physics and English.  
**Activities:** analysis of a student's needs, presentation of information and concepts in a form appropriate to the student
  - 1989 October to 1990 August : Surveyors Assistant for Peters Hango and Associates in Saskatoon, SK.  
**Activities:** interpretation and calculations involving the site rough grading plans, secretarial work, surveying field work.
  - 1989 August to October: Service Position at the Bulk Cheese Warehouse in Saskatoon, SK.  
**Activities:** work at the till, stocking shelves, general cleaning, assisting with accounting software
  - "The Complete Project Management Seminar", course provided by the University of Toronto, Toronto, ON.
  - "PLATINUM Process Continuum Project Management", course provided by PLATINUM TECHNOLOGY INC. (now Computer Associates), Phoenix, AZ.
  - Certified ScrumMaster (<http://www.controlchaos.com/certifiedscrum/>)
  - Lean Software Development, course provided by [Mary Poppendieck](#)
  - "Selling Your Ideas", course provided by Sun Microsystems Inc. SunU, Milpitas, CA
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## TECHNICAL TRAINING

- B.Sc. Computer Science - [University of Saskatchewan](#), Saskatoon, SK.
  - Extreme Frameworks developer training, course provided by Solution Architects Inc.
  - "Object-Oriented Development", course provided by NeXT Computers, Redwood City, CA.
  - Microsoft Certified Application Developer (MCAD) C#/.NET
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## PUBLICATIONS

- [Agile Advice blog - How and Why to Work Agile](#) various articles about agile theory, agile practices and agile stories.
  - "[The Software Construction Analogy is Broken](#)", paper published on the front page of [Kuro5hin](#), referenced from [Agile Alliance](#).
  - "[Resources for Software Professionals](#)", self-published categorized bibliography.
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## CLIENTS

**Banking/Financial:** CapitalOne, Charles Schwab & Co., Wachovia Securities, InSystems

**High-Tech:** Sun Microsystems, Troba Inc.

**Telecommunications:** Iridium, SaskTel

**Healthcare:** US Department of Defense Healthcare

**Education:** MyMIND.net, Keyano College, University of Saskatchewan

**Oil and Gas:** Q-Soft Inc.

**Government:** Alberta Environment, Saskatchewan Human Rights

**Retail:** Robert Reimers Enterprises, Inc.

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## PROFESSIONAL MEMBERSHIPS:

Agile Alliance <http://www.agilealliance.org/>, Project Management Institute (PMI) <http://www.pmi.org/>,  
Independent Computer Consultants Association (ICCA) <http://www.icca.org/>

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## VOLUNTEER EXPERIENCE:

- 1987 to the Present: Community Development Worker at various times in Canada, the United States, Belize, and the Republic of the Marshall Islands.  
Responsibilities: develop human resources in various communities, working on volunteer boards of directors and committees, making presentations, leading classes, writing reports. Positions held include Chairman and Secretary.
  - September 1997 to January 1998: Youth Class Instructor for the Baha'i Community of San Mateo, CA.  
Responsibilities: work with co-instructor to design and present course curriculum and materials.
  - June 1994: Volunteer Math Tutor for students at the Youth Services Program, Saskatoon, SK.  
The youth services program works with youth who are emotionally disturbed to provide counseling and other services.
  - 1989-1994: Volunteer Judge for Regional and Aden Bowman High School science fairs, Saskatoon, SK.
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## TECHNOLOGY SKILLS IN DETAIL

- Software Architectures: 3-tier, messaging, web, client/server, distributed
- Object oriented analysis and design: UML, Design Patterns, Refactoring
- .NET: WinForms, ADO.NET, networking, IIS web services, BizTalk, Portal Server
- J2EE: JMS, JNDI, JDBC, JSP, XML, XSL, Servlets, EJB, Weblogic 8.1
- Java: 1.1.x, 1.2.x, 1.3.x, 1.4.x (including Swing), J2ME
- Thin Client: Struts, JavaScript, HTML, DreamWeaver
- Middleware: Tibco Rendezvous MOM, CORBA, Visigenic Visibroker ORB, MQSeries
- Imaging: IBM's Content Manager and FileNet's Panagon IS
- Database: SQL Server, Sybase, Informix, Oracle, PostgreSQL, MySQL
- Modeling: Rational Rose, Together J
- IDE's: Eclipse, Visual Studio .NET 2003, Visual Age for Java, JBuilder, Visual Cafe, Visual Studio
- Configuration Management: Subversion, cvs, CCC Harvest, Razor, Visual Age, ClearCase
- WebObjects, OPENSTEP and NeXTSTEP programming environments

- Java, C#, C++, Objective-C, C and Pascal languages
  - Exposure to Lisp, Postscript, Miranda, Prolog, Python etc.
  - WindowsNT/2000/XP/95/98/ME, FreeBSD, OpenBSD, RedHat Linux, Solaris, MacOS/X, VAX/VMS
  - Unix system administration: bourne shell scripting, qmail, apache, cygwin
  - Productivity Tools: MS Office, OpenOffice.org, Visio, MS Project
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## **INTERESTS AND HOBBIES:**

Education, Economics, Composing Electronic Music, Architecture, Languages (Arabic, Chinese, French).

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## **REFERENCES:**

Available on request.

**Updated: 20050413**