

Thumbnail

Highly skilled professional specialising in information design, web content, documentation, business writing, and training projects.

Expert writer, editor, instructional designer, and project manager with superior ability to synthesise and simplify complex materials. Direct business, education, and public sector background adds value to any assignment. Independent or team worker. Industry experience includes finance (banking and investments), insurance, software and internet-based applications, government, health, and more.

Writing, Editing, Training Projects

Business, Training, and Technical Communications Specialist: Plan, implement, and manage information design, documentation, business writing, and training projects.

- Research, design, develop all types of business, technical, and training materials and solutions
- Develop, and write proposals, business plans, briefs, reports, RFPs, requirements, specifications, and other business documents
- Evaluate effectiveness of information products and training solutions and recommend improvements to design, structure, and content
- Develop and produce training materials (paper, web-based)—course curricula, instructor guides, participant workbooks, slides, other supporting material
- Write, edit, and produce business process and software documentation (paper, online)—user and reference guides, online help, web-based material, policy and procedure manuals, programmer guides
- Design and develop brochures (paper, online), white papers, case studies, newsletters, and other marketing and corporate materials
- Act as coordinator, writer, and/or editor for large documentation and training projects to ensure consistency and focus
- Design and deliver business writing and web writing workshops and seminars to help people write clearly, succinctly, and effectively

Management Experience

Project Manager: Managed negotiations, mediated and resolved conflicts, and conducted all business affairs for a small condominium involved in negotiating a development agreement for a shared facility.

Project Manager: Managed a federally funded job placement program; developed and delivered job search training programs; produced a newsletter for job seekers, employers, and agencies.

VP and Portfolio Manager: Managed securities portfolios and general operations for a small investment firm.

Senior Account Manager: Managed a commercial lending portfolio and team of lenders for a major bank; wrote comprehensive reports analysing company performance.

Executive and Advisory Positions

Executive/Sr Member	Society for Technical Communication, 1992 to present
Advisor/ Instructor	Principles of Information Design U of T 1999-2002 Writing for the Web, Technical Editing, U of T+, 1997 to present Seneca College Technical Writing Program, 1997-2002 Humber College Technical Writing Program, 1997-2000
Co-ordinator	George Brown College, Online Documentation Course, 1997-8
Advisor/Director	TSCC #1483 2006, MTCC #593 2002-2004, #764 1990-1997
Editor	Communication Times Newsletter, 1993-1994, Ontario FolkDancer Magazine, 1992 to 1994
Director	Jewish Vocational Service, 1988 to 1993

Affiliations

STC	Senior member, Associate Fellow
EAC	Voting member
OSTD	Member

Education

MBA	York University
BA	McGill University, Honours Psychology
Certificates	Canadian Securities Commission Course, Honours Ontario Teaching Certificate

Hardware and Software

Word Processors	Word, WordPerfect
Authoring Tools	Doc-to-Help, RoboHelp, DreamWeaver, Front Page, FrameMaker, WebWorks, PageMaker, others
Graphics	CorelDRAW, PowerPoint, Illustrator, Paint Shop Pro, PhotoShop

Awards

Society for Technical Communication (STC)	Associate Fellow (2001), Distinguished Chapter Service (2000), Distinguished Award and Best of Show (Online 1995), Distinguished Award (User Guide 1998), Award of Excellence (Newsletter 1997), Merit Award (Training Materials, Online Help 1998; Promotional Materials 1996, 1997; User Guide 1995), International Achievement Award (Newsletter 1994)
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Sample Projects

- Business Documents
- Marketing/Presentation Materials
- Policy and Procedure Guides
- Programmer and Operator Guides
- Training Materials
- User and Reference Guides
- Web Content and Online Documents

Business Documents

AT&T Canada	Wrote a technical description for a new ATM (Asynchronous Transfer Mode) service.
Automation Services Inc.	Researched and wrote a series of Scientific Research and Experimental Development tax credit applications on behalf of the company.
CIBC	Wrote a series of plain language contracts for various merchant services.
Computron Canada	Designed and wrote a business plan and corporate information package to solicit financial assistance for the company.
Direct Software Services	Produced a major report analysing the technological, data, and systems architecture requirements for NT's Global Information Services division.
FNF Canada	Edited computer policy documents and response to RFP for CIBC portal project.
Footprint Software	Researched and wrote a series of Scientific Research and Experimental Development tax credit applications on behalf of the company.
KCA & Associates	Edited several documents for a project designed to help internationally educated professionals gain access to their professions here.
Kurtz & Steel Limited	Wrote company business plans and capital financing proposals for government grants and venture capital assistance.
Manulife Financial	Assembled, structured, and documented the results of a strategic reorganisation effort undertaken by the Development Services group.
Ministry of Health	Produced a plain language report introducing community health profiles and describing their role in community health planning.
Newstar Technologies	Wrote, edited, and compiled responses to various multi-million dollar Requests for Proposals to build applications for the banking industry.
Ontario Power Generation	Wrote a discussion paper for the Electrical Production group pointing to the need for an integrated health and safety management system.
Oshawa General Hospital	Rewrote a major report analysing hospital systems. Also wrote the hospital's submission to the Health Services Restructuring Commission.

Business Documents cont'd

Royal Bank	Facilitated development and documentation of a new credit management process for the corporate lending division. Also developed training and documentation requirements and created related presentations and training materials for different functions within the division.
Scotia McLeod	Wrote a 50-page Request for Proposal (RFP) to solicit bids to install a new workstation system in the company's 53 branches across Canada.

Marketing/Presentation Materials

Algorithmics Ltd.	Designed and wrote a series of product information sheets for the company's suite of financial risk management applications.
BAKA	Wrote several newsletter articles for a forensic accounting firm.
Brighthouse Inc.	Wrote and edited several fact sheets and brochures for clients of this design firm.
Bulldog Canada	Wrote a position/concept paper on media asset management and the company's new software application.
CDI	Developed and wrote a brochure outlining a new training offering for companies migrating to new technologies.
Certicom Corp	Designed and developed a slide presentation introducing the company's encryption and security hardware and software products.
Computron Canada	Designed and wrote a series of presentations, product information sheets, product guides, and white papers describing an object-oriented open systems maintenance and work management application.
Direct Software Services	Designed a presentation outlining the technological, data, and systems architecture requirements for NT's Global Information Services division.
Diversified Financial Management	Developed a company logo, letterhead, and brochure for an investment management company.
InSystems Technologies	Wrote a series of case studies to illustrate the use, features, and benefits of the company's document assembly and management applications.
Learning Matters	Analyzed and edited web marketing materials for this training consultancy.
Manifest Communications	Wrote and edited marketing material for a web-based charitable donor information site. Also evaluated the company's web site navigation.
Museum for Textiles	Wrote copy for a brochure advertising a textile exhibit at the museum.
NCR	Wrote ads, brochures, case studies, testimonials and fact sheets about various products and services, including item and remittance processing, imaging, archiving, electronic and web-based delivery applications.

Marketing/Presentation Materials cont'd

OSSA	Designed the structure and wrote the content for a series of fact sheets promoting safe work guidelines. Also edited several guides, courses, and other related documents.
Peoples Jewellers Corporation	Implemented the company's Year 2000 communication strategy. Wrote letters, employee bulletins, newsletter articles for different audiences.
PROMIS Systems	Designed and produced an internal newsletter for company personnel.
Rogers Cantel	Wrote a testimonial/case study for clients of this company.
Royal Bank	Designed and wrote a presentation introducing two new deposit products.
Scotia McLeod	Wrote a series of articles on various financial topics for a newsletter distributed to account representatives and their clients.
Stats Schedules	Developed a logo, booth presentation signs, brochure and business cards for a trade show introducing this company's new medical scheduling application
STC	Managed the initial stages of research into a new corporate identity for the international association.
Sun Life of Canada	Researched and wrote a booklet on retirement planning and issues for people in the their mid-career years.

Policy and Procedure Guides

Altamira	Revised and edited a policies and procedures manual on investor products and services.
Compass Group Canada	Compiled, edited, and produced a policy and procedures guide for the food services department at the Milton Correctional Institution.
First Marathon	Edited and wrote a series of documents outlining the company's Year 2000 testing and modification procedures.
KCA & Associates	Developed a guide for organisations involved in helping internationally trained professionals gain access to their professions here.
Ministry of Health	Designed, wrote, and edited a capital planning procedures guide for use by community health organisations and hospitals.
PAPA & Associates	Rewrote a procedure manual for the Scarborough Public Utilities Commission's vendor assessment program. Also developed the template and edited a series of manuals for Ontario Power Generation (OPG).
Sayers & Associates Ltd.	Revised and edited the company's policies and procedures manual on construction and engineering practices.

Programmer and Operator Guides

Ainsworth Technologies Inc.	Produced an operator's manual for a new OS/2-based message processing system for the Coast Guard of Canada.
BackWeb Technologies Inc.	Revised a guide for administrators of a web server that delivers targeted content to end users.
Bryker Data Systems	Wrote a programmers' guide describing a prototyping and rapid application development process and tools used to create client/server applications.
Elliott Jackson Communications	Acted as editor for a team of five writers documenting procedures for a UNIX-based transaction processing system for a major credit card company. Also developed a style guide and template for all writers.
Kurtz & Steel Limited	Wrote a programmers' guide describing a proprietary toolkit used to design and develop a materials, maintenance, and work management application.

Training Materials

Ainsworth Technologies Inc.	Developed one- and two- day training courses outlining how to use a new Coast Guard message processing system.
Architel Systems Corporation	Developed three instructor-led training courses for a telecom order processing system and inventory management system.
CCI	Developed a web-based training course for a call centre support application.
CDI	Evaluated business courses and recommended design improvements. Also developed a web-based resource centre for professional employees.
Centre for Forensic Sciences	Developed a single-source user guide, training guide, and train-the-trainer guide for a new evidence tracking and management system.
CIC	Developed and delivered a one-day workshop on writing for the web for Citizenship and Immigration Canada (since delivered elsewhere).
FCIDB	Developed self-study materials for deposit products and procedures for this association of deposit brokers.
Investment Funds Institute of Canada	Developed, wrote, edited, and updated training materials for several self-study courses including mutual funds, securities, operations, risk evaluation, ethics. Also developed prototype content and approach for converting existing course materials to web-based training.
Manulife Financial	Developed CBT and workshop material for a new release of an application to help field personnel process and manage client transactions.
Netcom Canada (now AT&T)	Conducted a business writing workshop to help company personnel improve their business writing skills.
RLI (Ryerson)	Edited and formatted a book on selecting an appropriate retail computer system. Also edited and evaluated an existing CBT application.

Training Materials cont'd

Royal Bank	Developed training materials describing a new credit management process and the credit management application that supported the process.
Trango, a division of Siemens	Analysed training needs and recommended a solution consisting of an orientation program, intensive workshop, ongoing presentations and annual events. Created materials for intensive 2-day workshop.
Wellesley Hospital	Wrote three self-study guides—on writing résumés, job search letters, and marketing—as part of the Career Centre's Career Planning Series.
Writing for the Web	Developed and delivered a one-day course on writing for the web. Covers the difference between web and paper documents, navigation, writing style, and more.

User and Reference Guides

AT&T Canada	Wrote user guide and web content describing a Virtual Private Network product for the Internet.
Canadian Pacific Limited	Updated and edited a booklet describing how to use the new release of a proprietary electronic mail system.
CIBC	Developed a style guide and acted as team editor to develop paper and online training and reference materials for a new user interface.
Centre for Forensic Sciences	Developed a user, training, and train-the-trainer material from a single source for a new evidence tracking and management system.
Certicom Corp.	Wrote a user guide for software that manages a fax security device. Also edited hardware installation, administration, and user guides.
Direct Software Services	Designed and wrote a project planning guide for Northern Telecom Canada's Global Information Services division.
Instinet, a Reuter Company	Developed an award winning user guide for a communications gateway to live securities information and other brokers' securities positions.
Investors Group	Wrote and edited an orientation guide for new sales reps and a second manual on setting up and running an independent business.
Kurtz & Steel Limited	Team editor for five writers of paper and online user and reference materials for an object-oriented enterprise-wide work management system. Also created documentation standards and policies.
Ministry of Natural Resources	Redesigned and rewrote two user guides for a forestry planning and toolkit/database application.
Netcom Canada (now AT&T)	Developed and wrote a user guide for a new commercial business product as well as a guide for the company's existing ISP services.

User and Reference Guides cont'd

PROMIS Systems	Revised and restructured a user manual and help files for a UNIX-based electronic document approval and release system.
Versus Technologies	Designed, wrote, and edited award-winning user guides for several financial products developed for securities brokers.

Web Content and Online Documents

BackWeb Technologies Inc.	Revised an online help file for administrators of a web server that targets and delivers content to end users.
Canada Trust	Developed online help for a transaction processing system that pays bills, transfers funds, issues cheques, and tracks investments.
CCI	Created a web-based resource centre for professional employees. Designed the site, structure, and navigation and developed the content.
CIBC	Developed online help for a cash management system
CIC	Developed and delivered a one-day workshop on writing for the web for Citizenship and Immigration Canada (since delivered elsewhere).
Certicom Corp.	Created an HTML help file and WinHelp file for users of the company's elliptic curve cryptographic service provider.
CyberWorld	Wrote a web-based help file for three-dimensional building tools used to create virtual worlds on the web.
Instinet, a Reuter Company	Designed and developed an award-winning online help system for a real-time securities information product.
Investment Funds Institute of Canada	Developed a prototype for web-based training and ultimate conversion of all materials to this format.
Learning Matters	Analyzed and edited web marketing materials for this training consultancy.
Link Multimedia	Wrote intranet content introducing a new business performance measurement system for a major financial company.
Manifest Communications	Wrote and edited marketing content for a web-based charitable donor information site. Also evaluated web site navigation and made recommendations for improvement.
ManuLife Financial	Wrote and later revised an online help file for a system that illustrates various insurance concepts and products.
MDS Sciex	Developed information models underlying the company's single-sourcing strategy for online and paper documents.
Metropolitan Toronto	Evaluated a suite of 10 online files. Recommended a strategy to rationalise and revise them. Also provided training on how to structure and build help files with Doc-to-Help.

Web Content and Online Document cont'd

Netcom Canada (now AT&T)	Developed web-based marketing material for various product offerings. Also developed HTML-based help for a new commercial business product to complement the user guide for the same product.
Sun Life of Canada	Designed and developed a help file for a benefits enrolment system.
Telepresence Inc.	Created an HTML help file for a web-based community publishing tool.
William Horton Consulting	Edited the content for this well known consultant's web site (www.horton.com) and acted as copywriter and proof-reader for a recent book on e-learning tools and technology.
Writing for the Web	Developed and deliver a one-day course on writing for the web. Covers the difference between web and paper documents, navigation, what attracts attention, writing style, and more.