



“CSN’s objective of rapid product and simultaneous business infrastructure development will require the guidance of a true **CDIO** – one that can blend the traditional activities of the CIO and the emerging responsibilities of the Chief Digital Officer, focused on preventing harm to children, youth and schools by using innovative technology, Bill Neff has every tool in his expertise to accomplish CSN’s Safety & Security initiatives” – Ward E, Leber, Founder

Bill Neff, CDIO
CSN Senior Advisor
Chief Digital Information Officer

Bill Neff brings 35+ years of diverse experience in business transformations, startups, and IT executive management. This includes cloud-based product solutioning and architecture, classic “off the shelf” large-scale ERP & CRM program management, application development, data analytics, technology engineering/robotics/ factory automation, and operational IT management roles. In short, evolving from the traditional IT/Development and CIO roles into combined CIO/CDO roles in recent years.

Fun Fact:

I come from a PA fifth-generation family of undertakers & furniture makers.

President, Zero Compass Consulting

(Part Time CIO, Consulting, Strategy & Roadmap Development, Program Planning & Execution, Vendor & Product Selection, Digital Technologies Contracts.)

President, Gravel Spring Lodge

(Hunting and Land Conservation)

Executive



- o **Otis : America’s CIO/CDO (C-level)**
\$4B / 14k employees
\$75M budget / 50 direct employees
35 in-direct, 150+ contractors/offshore
- o **Asurion : Director, Information Systems / Service Solutions**
- o **Fairchild Aerospace : Director, Enterprise Applications and E-Commerce**

Industries



Digital/ Transform/ Startups

- o ASG Startup/Elevator Consolidation
- o Great American Storage - Startup
- o Urgently.com Call Center Transformation
- o Otis Service & Digital Transformation / Connected Elevators (GEN3 / Otis ONE IoT)
- o United Technologies – Otis/Carrier Split
- o United Technologies – BIS – Service Trans
- o NEW Asurion – Service Solutions
 - o Repair.com Startup/ ServiceBench
- o NEW Warranty – Transformation/Growth
 - o IP-Mill.com Startup – bought by NEW
- o Faidor – Regional Jet Startup (Germany)
- o Carrier/Electrolux – Greenfield Factory Startups – Factory Automation

Skills



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1

Late 2022 - Present

**ASG STARTUP /
ELEVATOR ISP
CONSOLIDATION**

ARCLINE



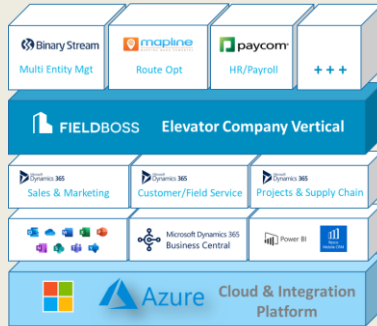
MISSION

ARCLINE is a private equity Investment Management Company who specializes in unlocking potential of portfolio companies. AEG was formed to consolidate ~20 northeast elevator ISPs – creating a common operating platform and operational efficiency.



DEVELOPED COMMON OPERATING SYSTEM

FIELDBOSS, MS Dynamics (CRM/Service), Business Central (ERP)

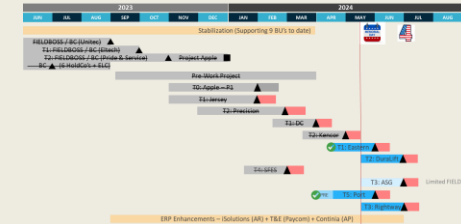


- Robust ecosystem of partners and add-ons**
 - Allows for faster buildout and scaling of new capabilities
 - Fully supported by partner teams
 - Runs on same secure and reliable cloud platform
- Proven elevator industry expertise**
 - Elevator configuration and customizations
 - Elevator process & KPI knowledge
 - 3rd party package experience and integrations
 - Implementation expertise
- Industry-proven and scalable core**
 - Fully Microsoft-supported and updated
 - Fully integrated
 - Highly configurable
 - 100% SaaS / Cloud-based
 - Secure & Reliable

MY ROLE



- CIO/CDO Consulting, Solutioning, Strategies
- FIELDBOSS Partnership Management
- AEG Overall FIELDBOSS Program Manager
- 3 Months Multi-Business Unit Architecture & Solutioning / 14 Successive & Overlapping BU implementations in 14 Mo's / w Shared Services



2

2014 – Early 2022

**Otis Americas - Service
& Digital
Transformation /
Connected Elevators
(GEN3 / Otis ONE IoT)**



MISSION

Simultaneously maintain/improve legacy Mainframe & MS .NET custom-built applications WHILE migrating to newer off the shelf global CRM/ ERP cloud-based solutions (transforming Sales, Call Center, Service) AND development/deployment of new global Digital Solutions for the GEN3 connected elevator (IoT connected elevators).

CORE MIGRATION

America's - \$4BN, US/CA/LATAM, 4K office/ 10K field employees, 2 MFG Plants, 350K+ Elevators

(Americas) Custom Mainframe & .NET Applications

(Global) "off the shelf" Solutions

Americas – Service System Landscape



Americas – NE/MOD System Landscape



DIGITAL PRODUCT DEVELOPMENT



Gen3™

- ☐ SERVICE DATA APIs
- ☐ REAL-TIME OPERATIONS DATA APIs
- ☐ ELEVATOR CALLING APIs

Secure Connectivity via IoT Gateways (350K+ Devices in Americas)



MY ROLE

C-Level Employee

- CIO/CDO – Americas Region
- \$75M budget / 50 direct NAA HQ employees/ 35 in-direct LAA & MFG employees /150+ contractors on & offshore
- Overall Systems Ownership for America's - Strategy, Architecture, Direction, Partner Management, Development, Implementation & Rollout, Operations & Support
- America's Partner & Contract Management – Multi-million-dollar IT Contracts – for both support of legacy environments (offshore) & implementation of new technologies (onshore).
- Global Liaison/ IT Team Transformation – fully owning custom "regional solutions" to deployment, support, requirements gathering for "global solutions"
- DIGITAL/IoT– Regional team development. Hands on IoT cellular gtwy installations, troubleshooting, etc.



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Early 2022 - Present

Startup Consulting

MISSION

Assist startup companies with varying systems needs – depending on life cycle stage. Temp or Part Time CIO/CDO, Consulting, Strategy & Roadmap Development, Program Planning & Execution, Vendor & Product Selection, Digital Technologies Contracts.



RECENT EXAMPLES: (MY OWN FLEDGLING CONSULTING GIG) *Aside from ASG*



- o Strategy Deck/Pitch Deck Assistance
- o Business Plan Assistance
- o Basic IT Infrastructure (Google Workspace)
- o URL/Domain Procurement



- o Creative Design Sourcing & Assistance: Branding/Logo creation



- o Construction Project Management Tracking Software



- o Thought leadership on NextGen Operations platform & call center technology
- o BPO- partner selection, contracts, implementation management

MY ROLE ZeroCompass

- o CIO/CDO Consulting, Solutioning, Strategies
 - o Partner/Technology Selection/Outsource
 - o Partnership Management / Contracts
 - o Creative Design Sourcing & Assistance: Branding/Logo creation
 - o Program/Project Management
 - o Basic IT Infrastructure & Support
- VERY'S SIGNIFICANTLY DEPENDING ON CLIENT NEEDS...**

4

Late 2011 - 2013



NEW (Asurion) – Service Solutions

- o Repair.com Startup
- o ServiceBench.com Transformation
- o Service Network & Operations

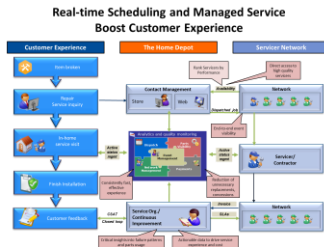
MISSION

NEW (National Electronics Warranty) just prior to being acquired by Asurion - was looking for **new ways to monetize their Service Assets** – 3rd Party Service Network, Call Center, Repair.com URL, ServiceBench.com company acquisition, etc.

Key members of the NEW organization, Service Bench, and former AOL.com / BBy Geek Squad employees were combined into a “Start-up” group within the company. BAIN consulting, Liquid Agency, MADE, Mag7 and various other partners engaged.



SERVICE & DIGITAL PRODUCT DEVELOPMENT



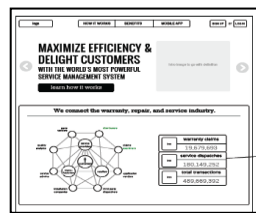
BAIN & COMPANY Core Service Offering –

- o BAIN Consulting – go to market strategies/onboarding
- o Target Customers – HomeDepot, Sears, etc.
- o “WHITE LABELLED” - 3rd Party Outsourced Service Network, Call Center & Scheduling & Status for Appliances, TVs, etc.



ServiceBench.com [Link to Process](#)

- o Revitalized ServiceBench. New Branding, Logo, Reskin of App



Repair.com

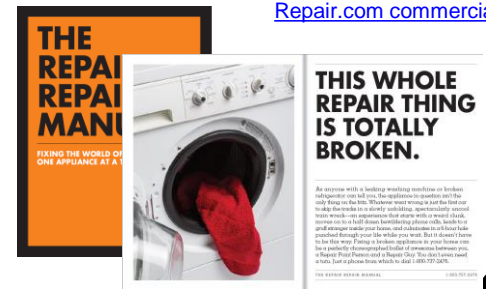
- o Parallel Development of Online/Digital / Direct to Consumer Channel – Leveraging our Repair.com URL
- o Radio/Billboard/Online SEO market testing, A/B pricing and other aspects.
- o Initial design internal team, MADE, Liquid improved design



MY ROLE Dir-Level Employee

- o Director of ASM Technologies – 3rd Party Network, Call Center, & Service Scheduling
- o “Core Technology & Integration” Expert for Sales Engagements / repair.com
- o BAIN & Company Partner Management
- o Mag7 Partner Management / Project Manager for ServiceBench Revitalization

[Repair.com commercials](#)



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5 Late 2000 – Mid 2011

NEW Warranty Inc. Transformation & Growth (\$8z0M -> \$1B - > merge with Asurion)

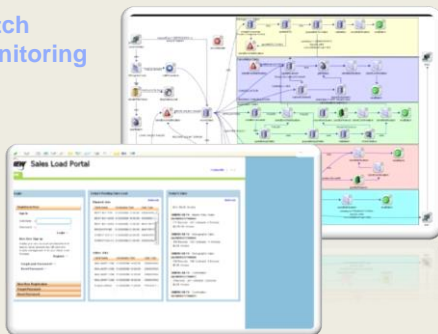


MISSION

Transform “white label” Warranty/Service business –enable for explosive growth - including migrating systems and applications from legacy custom built AS400 to modern off the shelf CRM/Call Center technology, contract management, customer self-service portals, Insurance/claims processing and advanced telephony/IVR automation.

White Label Customer Sales Integrations Warranty Purchases

Batch Monitoring

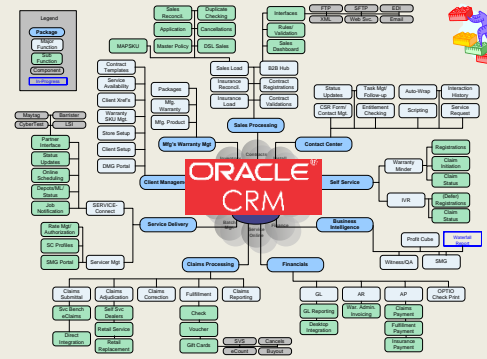


White Label Warranty & Repair Services

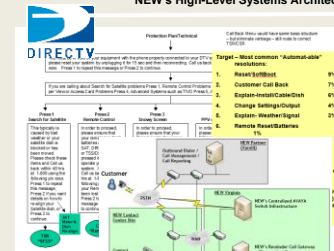


White Label Customer Portals
Warranty Registration & Repair/ Replace Scheduling

Complex Systems Footprint – Sales, Call Center, Contracts/Claims, Insurance, Customer Portals, Financials, “white labeling & integrations” for all the partners+ to the left....



NEW's High-Level Systems Architecture – “Retail Core” V2007-1



Large Complex Call Center – 1000s of CSRs - DTV's 2nd largest troubleshooting call center – revamped their IVR. Redundant Avaya Switches, CTI, Call Routing, etc.

3rd Party Network/Parts Command Center for Job Monitoring, Repair/ Scheduling Integrations, Centralized Parts Ordering ServiceBench.com

MY ROLE(s) Dir-Level Employee

- Multiple Roles in Company as Growth/ Expansion Dictated:
- Director, Application Development/ CRM (SMARTsystem) Program –
 - Led Migration Project from AS400 to Oracle “SMARTsystem”. Oracle E-Business Suite - CRM, Contracts, Tele-Service, Service and Finance. Created the core system for all subsequent new clients as well as continued migrations
 - Led “optimization & enhancement” phases of SMARTsystem Platform. Added CSR automation, Self Service – Consumer Portals & IVR, Advanced Search and Duplicate Record Checking, Claims Automation and “Back Office” task tracking and escalations management. Reduced Call Average Handle Time by 61s, saved \$3M+ in deferrals, and saved \$1.5M via self service technology.
- Director IT, Application Management & Quality
 - Created, managed, & led (42+FTE) dedicated Application Operations, Tier2 Support, and Quality Assurance Teams. Transitioned IS from a “Project” focused implementation style to monthly based “Product Release Cycle”. Developed formal QA team – including processes, tools, and methodology.
 - Led DirecTV Client (DTV) Productivity Improvement efforts (along with appropriate IT resources) – DTV Troubleshooting IVR, DTV ICM & Call Routing, DTV CTI. Reduced Call Volume by 11+%, Reduced Overall Contact Rate by 2%, Saved in excess of \$5M.



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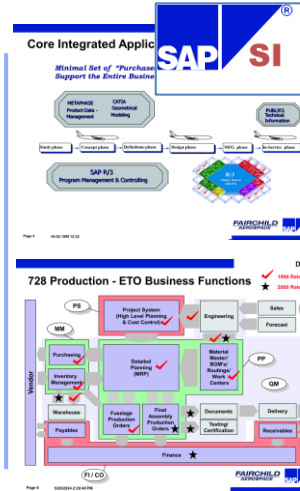
1998 – Late 2000



“Faidor” Regional Jet Manufacturing Startup/ Transformation

MISSION (FAILED Mid-Way/FUNDING)

Become the leading vendor of regional aircraft/ 3rd largest commercial aircraft manufacturer in the world by merging FAIRCHILD AEROSPACE IN San Antonio, Tx and Dornier Luftfahrt GmbH in Wessling, Germany. Take the existing 328 Prop plane and convert to a 328 Jet. Then build out: the 50-90 seat variants. \$600M/2700 people to \$4B and 5000 people in 5 years. Create an integrated systems environment that enables: SG&A reduction from 12% to 6% of Sales, and increase inventory turns from 2 to 3.



(SAP/SAP Consulting) New Integrated Systems–

Complex integrated environment - “build to order” manufacturing including:

- Engineering Design
- Configuration Management (EDM, BOM, etc.)
- Order Processing
- Master Scheduling
- Capacity Planning / Production Planning
- Materials Management / Serialized Parts Tracking
- Production Controls
- Finance/Accounting/Assets
- Payroll/HR/Labor
- Documentation (FAA)

MY ROLE Mgr -Level Employee

- o **Director, Enterprise Applications and E-Commerce** (San Antonio, TX / Wessling, Germany) - responsible for building the Information Systems organization for new Jet Programs (9 internal people / 17 Outsourced people) (\$6M annual budget)
- o **SAP Program Manager** - responsible for company wide rollout of SAP Aerospace & Defense – Multi-Year Rollout – 1500 named users – US & Germany – Team of 150+ business people (30 Full Time) and 22 SAP Consultants (15 Full Time) – Initial Rollouts Completed in 5 months. Co-leader of an Ernst & Young “Lean Operations Architecture” Team (\$30M Budget – not including internal headcount costs) – SG&A reductions.

7

1991 – 1996



Carrier Manufacturing Startup/ Transformation / Introduction of New “Rotating Compression” Products – Scroll, Screw, Reciprocating, etc.

MISSION

Carrier was entering into a period of significant transformation. From a product perspective they wanted to introduce new “rotating” compression technology to the market – this would entail a new Scroll Compressor manufacturing plant in AR; a refurbishment of an existing plant in Syracuse, NY for Screw; and combination of them with a Korean Recip plant to form a new Division (Carlyle). Carrier was also undergoing a global digital transformation with new ERP systems and standardized “LEAN” mfg.

State of the Art / Quality Controlled / Highly Automated Manufacturing Plants



SCREW COMPRESSORS

The development of the Carrier screw compressor began earnestly in 1987, when Carrier concluded that HFC-22 would become the dominant refrigerant — which, in time, would give way to chlorine-free refrigerants such as HFC-134a. The Carrier screw compressor is fully compatible with positive pressure HFC refrigerants.

At that time, Carrier elected to become a licensee of SRI (Svenska Rotor Maskiner AB) in order to insure that the most up-to-date engineering technology available would be utilized in all Carrier designs. Worldwide, almost all producers of screw compressors are SRI licensees.

Carrier screws will range in size from 180 to 350 tons for HVAC/R applications. They are designed in a unique fashion, such that the basic compressor can be supplied in either an open type or semi-hermetic configuration, as well as with or without submersible internal compression ratio control. Thus, Carrier screw performance and application versatility in cooling, storage, and heat pump applications — as well as straight HVAC/R — is unmatched globally.

The open type versions are configured to rotate in the correct direction for making gas engine driven applications, and both versions have been designed for the performance, life, and reliability requirements of industrial refrigeration applications using all acceptable refrigerants.

Carrier screws are positive displacement compressors resulting in surge-free operations regardless of load. The rotor profile, lobe combination, and manufacturing tolerances have all been selected to attain the highest possible compressor performance levels available anywhere in the world. The compressors do not use conventional gaskets or spacers for sealing and are manufactured to quality standards.

Written up in Arkansas Business Journal/ Wall Street Journal



Adobe Acrobat Document Adobe Acrobat Document

XEROX CHESSE ERP (one of the first to run on mid size Vax/VMS computers – independent of mainframe)

MY ROLE (s) Mgr -Level Employee

- o **Divisional IS Manager; Carlyle Compressor (\$150M) – (Division Startup) - NY -** Matrix Position -Compressor Division Vice President and Vice President of Carrier Information Systems. Responsible for all Systems/Personnel (22) within the Division. Also responsible for Strategic Business Planning & Process Re-Engineering. Compressor Warehouse Startup; TR3 Reciprocating Compressor Plant Re-engineering; Screw Compressor Product Line introduction into TR3;
- o **IS Manager, Scroll Compressor Operations (\$100M Greenfield Startup) = AR-** IS Manager (7 people) reporting to Plant Manger. Responsible for defining, installing, supporting, and building organization for all (\$3M IS budget). Fully integrated Engineering to Business/MRP II/Planning to Factory Floor Automation.

