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## **Brief History – Nurturing Project since 1986**

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Established in September of 1986, Kevin Miller received his first \$25,000 contract to help a small startup property and casualty insurance company successfully develop a unique processing and billing system, running on a personal computer network. Therefore, avoiding the larger main frame computers and associated costs, a working solution unheard of in those days. After taking on additional contract work, especially in the insurance industry, Kevin's company grew, eventually adding staff and offices in downtown Kansas City. This growth allowed the flexibility and funds to move into other industry sectors including finance, property appraisal, distribution and manufacturing, accounting, trade and non-profit associations.

Transitioning with the rapid growth of the computer industry and the rapid expansion of applications development, in the mid-1990s, Kevin saw the need to begin to connect and partner with small companies and individual professionals, each with their own areas of expertise. This allowed Kevin and his company to focus in additional areas, including the management and facilitation of information and accounting projects, the implementation of several popular accounting packages. In addition, working with the young and more available technology of data connectivity, Kevin worked with clients, unable to afford this tool before, the ability to connect multiple location business sites into one communicating network.

At the beginning of the new millennium, seeing that computers, devices, applications, and connectivity were becoming commodities, Kevin and his company saw the growing need to help his clients make good decisions on the management and implementation of these tools. Again, using partnerships with and through uniquely talented companies and professionals, Kevin advanced his experience and knowledge into the areas of the awaking internet, website development, point of sale implementation, and business to business communication and connectivity.

Currently, in today's fast and ever changing inter-connected world, Kevin, his company and his network of partners are a lean and agile. Today the focus is on project facilitation, management and consulting, both in and out of the information technology industry, always with the goal of helping clients make informed and strategic decisions. Kevin and My Decision Tree, LLC continue the exciting work. The mission and the goal never changed in all this time: to help clients find the right map, path and destination to fulfilling their goals. Also, never changing, as always, looking to forge new and productive relationships with the many unique and talented companies and professionals.

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## Areas of Expertise

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- IT Consulting
- IT Project Facilitation
- IT Management
- IT Facilities Re-Location Management
- IT Disaster Recovery Planning
- Regulatory Data Reporting (examples: Insurance, Manufacturing, and Accounting)
- Software Compliance License Auditing
- Cloud based Systems Consulting
- Education IT Systems Implementation including  
(Facilities wireless connectivity, remote server access, device management)
  
- Accounting Project Facilitation
- Accounting Systems Transition  
(POS, Legal, Manufacturing, Non-Profit, Insurance Statutory, General)
- Accounting Systems Expert: QuickBooks (Pro, Premier, Enterprise, Non-Profit), Sage One (Peach Tree), Cougar Mountain (Denali), Many Others
- POS (Retail/Restaurant) Expert

### Online

- E-Commerce Solutions (PayPal, Amazon, Others)
- Website Development and Integration (WordPress, HTML5, DNN, Joomla, Others)
- Amazon Cloud and Web Services
- Google Cloud Databases and Web Services
- Cloud Based Systems and Storage Integration
- Microsoft Office 365 – SharePoint
- Other / Custom Solutions

### Other

- Streamlining and creating company communication solutions.
- Streamlining and creating company software solutions.

### Niche

- Restaurant POS implementation as part of opening new business / new location.
- Retail multi-location POS implementation.



## Technical & Professional Savvy

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- **Languages:** Legacy - Basic, FORTRAN, COBOL, FoxPro/Dbase, C, others | Current-VB/VB.net, SQL, C#, Java, Python, C++, Others
- **Frameworks:** ASP.Net 2.0 – 4.5, MSpec, others
- **Application Servers:** SharePoint 2007-2013, SAP, Java 2, Enterprise (J2EEE), others
- **Databases:** MS Access, MS SQL/Azure, MySQL, Oracle, Others
- **Operating Systems:** Windows, Mac, Linux (Legacy- Dos, UNIX, Novell, others)
- **Tools / Expert:** MS Office, Access, MS Office-365, Visio, PowerPivot, Data Analysis Toolkit, InfoPath, Microsoft Project, Adobe Creative Suite, Crystal Reports, many others.
- **IT Methodologies:** Traditional, Agile, Lean
- **Project Management:** Traditional, Agile, Extreme, SCRUM
- **Personal:** The ability to work with technical people on many technical levels, but also, and as important, the unique ability to sell my companies and partners services then work, communicate and implement with anyone from business owners, CEOs, CFOs, CIOs, company principals, managers and board members in a way that bridges the level of understanding, ultimately making the contract a success.

## Client Types

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- Small – Mid Size Businesses (up to \$60M – 25 to 75 People)
- IT Companies
- Appraisal Firms
- Manufacturers
- Insurance industry
- Restaurants
- Distributors
- Construction
- Education
- Associations/Non-Profits
- Retail
- Legal



## **IT Consulting Services – Management / Facilitation**

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### **-Consulting**

Decision Making/Facilitation: Hands on project management and/or facilitation with the goal of bringing a project, small to large to fruition. From discovery, mapping, resourcing, launch and implementation, these projects can be managed completely or facilitated between the established project manager and client's principals. This may additionally include:

- Needs assessment with the goal of creating a subset of options that best fits what the client needs to accomplish in any particular decision making process.
- Potential staff screening, interviews and hiring for the whole or parts of the information system departments.
- High level client and/or board presentations to communicate how the decision making process developed, as well as, the final decision.

General Consulting: A sounding board for clients, at a high level, to help in the decision making processes involved in creating, augmenting and changing their information, processing and accounting systems, for either short or long term structure or the needs of a special projects.

- Assist clients to make decisions based on my past experiences.
- Assist clients to understand future changes in systems, processes or software and how these may affect their business and sometimes more importantly assist clients to (NOT) make decisions based on past experiences with systems, processes or software.
- A sounding board for companies at a high levels including boards to help in the long term decision making process based on rapidly changing technology.
- Involved in creating, augmenting or down scaling based on a changing client's information or accounting systems departments for either long term structure or the needs of special projects.
- Taking Client's ideas and requirements for projects, undertake researching these needs with the goal of creating a subset of options that best fits with the client's ultimate goal.

### **-Information Systems Management (Specifically)**

Short Term Departmental Manager: Clients use management services on a temporary basis to augment or substitute an existing information systems position until a replacement can be acquired.

- Assume all responsibilities for position until replacement can be found
- Assist in the acquisition of personnel for the vacant position including screening, interview and final placement.
- Assist in the transition a new hire into the new responsibilities of the job.

Outsourced Manager: Clients of a certain size and need, use my services as a replacement to hiring full time Information systems manager.

- Assume responsibilities of department manager on an as needed basis meeting
- Structured meetings with high level management and departmental personnel to deliver finished work of the information systems department.



Augmented Manager: Hired for clients that need additional high level management of a special project or department to augment existing managers and personnel.

- This role can be vast and tends to be very specific to a client's needs.

#### **- Project Management**

Project Manager-Traditional: Clients use services on a variety of projects relating to information systems, accounting and processing areas. These services include leading a new project from start to finish utilizing client's vendors, personnel and other outside resources.

- Project timelines, budgeting and resource allocation.
- Client project updates, resource management
- Facilitation of project implementation and wrap up.

Project Manager-Internal: Clients use services on a temporary basis to manage a new project from start to finish utilizing client's vendors, internal personnel and other resources.

- Project timelines, budgeting and resource allocation.
- Client project updates, resource management
- Facilitation of project implementation and wrap up.

Project Manager-Outsourced: Clients use services on a temporary basis to manage a new project from start to finish utilizing subcontractors, and outside resources. This type of project does not require internal personnel with the exception of departmental head reporting.

- Project timelines, budgeting and resource allocation.
- Client project updates, resource management
- Facilitation of project implementation and wrap up.

Project Facilitation: Clients use services to facilitate between an established project manager or vendor and a client's principals.

- Facilitate via project manager, project timelines, budgeting and resource allocation.
- Communication of projects progress to client's principal, upper management and/or board
- Facilitation of project implementation and wrap up.



## IT Services – Overview

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### Direct Services

Software Application Design: Clients use services to design software to fulfill a need using modern programming languages, applications servers and backend databases.

- Acquisition of application requirements, application design, flowcharting, and technical direction for programming individual or team.
- This may move into a project management or facilitation role.

Accounting/ Processing System Implementation: Clients use services to help in the purchase, implementation of new software accounting system.

- Accounting: Design of chart of accounts, classifications, invoicing/sales orders, payables, and payroll.
- Data conversion from old legacy accounting/processing systems
- Reporting customization and integration to outside reporting software and applications.

IT Facilities Re-location Management: Clients use services as a full service or an augmentation to existing staff to handle all aspects of moving an Information systems departments or information systems with in a business from one location to another.

- Entire project creations and management.
- Inventory, insurance and equipment preparation
- Coordination of new services and cancellation of old with goal of no down time.
- Management physical move, installation and setup of system in new location
- Final trouble shooting and re-inventory

Software Compliance Audit: Clients use this service to inventory, and research compliance with licensing in accordance with software vendor agreements and regulations.

- Identify all software owned, and all software not in compliance with software vendor licensing
- Report all software licensing issues
- Help clients get into compliance with current software licensing



## Work Samples

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- Developed integrated billing system for three different property casualty insurance companies. Clients- 10-40M | 20 to 100-People Project- 100k to 1M | Resources- 1 to 5
- Developed integrated policy management system for two different property and casualty Insurance companies. Clients- 10-40M | 20 to 100-People Project- 100k to 1M | Resources- 1 to 10
- Developed policy management systems for malpractice insurance company. Clients-50M | 60-People Project- 400k | Resources-3
- Developed integrated claims systems for two property casualty insurance companies. Clients-5-25M | 60 to 80-People Project- 100k to 400k | Resources- 1 to 3
- Developed an integrated accounting system, customer management and statistical collection and reporting system for two different general insurance agency with nine inner-companies, consolidating all financial statements. Clients-2M | 45 People Project- 120k | Resources- 3
- Developed integrated property appraisal system for large commercial appraisal firm. Clients-5M | 55 People Project- 100k | Resources- 2. Currently integrating this same system with a new MS-Excel based reporting and file management system. Clients-7M | 40 People Project- 60k | Resources- 2
- Developed statistical systems for insurance companies for loss management, premium development and regulatory reporting. Ongoing annual statistical reporting. Clients-5 to 10M | 40 to People Project- 100k to 250k | Resources- 2 to 4
- Developed a consolidated Material Data Safety Sheet (MSDS) electronic depository for National Trade Association. Clients-1M | 4 People Project- 60k | Resources- 1
- Integrated popular mid-sized accounting systems for business ranging: Avg. Client size:-550k to 3M | 5 to 40 People Avg. Project- 5k to 50k | Resources- 1- 2
  - Insurance Companies, Agencies and Brokers
  - Distributors
  - Manufacturing
  - Job/Project based services, construction, and construction related businesses.
  - Single and multi-user/location retail point of sale systems.
  - General service businesses
  - Legal Industry handling trust accounting
  - Restaurant POS
  - Non-Profit Organizations, Trade Associations
- IT management and Project facilitation for a variety of business including:
  - Implementation of 25 retail locations for insurance company Client size:- 5M | 200 People Project- 50k | Resources- 2
  - Implementation of new network and facilities wireless networking for local private school
  - Re-location IT facilities for many companies including fortune 100 energy company in Texas from one locations as it merged into another location. Client size:-100M+ | 500+ People Project- 50k | Resources- 2
  - Several regulatory mandates for Insurance companies for Year 2000 compliance.



- Served as IT CIO/high level management for several companies since 1988 as they transitioned to new management, merged or spun off into other business. Hired on a consulting basis for a temporary period as each scenario demanded.
- Internet, Cloud and Web Based Services: Avg. Client size:-550k to 3M | 5 to 40 People Avg. Project- 5k to 20k | Resources- 1- 2
  - Back office and business to business web access projects allowing clients to access or export data via web for client’s customer or employee needs, including several insurance, commercial appraisal, ecommerce based applications.
  - Implementation of cloud based systems for a variety of companies in an increasing complicated market.
  - Facilitation, design and/or implementation of websites for variety of companies since 1995 including:

✓ Manufacturing	✓ Distributor	✓ Insurance
✓ Technology	✓ Commercial Appraisal	✓ Construction
✓ Legal	✓ Retail Specialty	✓ Education
✓ Architecture	✓ Restaurant	✓ Others
✓ Bankruptcy Trustee	✓ National Product Sales	✓ Painting Services

- Niche and Specialty:
  - Point of Sale system implementation for many start up restaurants and new location openings. This includes working with contractor for build out in relation to POS and axillary systems. Consulting in POS equipment acquisition and implementation. POS menu and software setup, training and opening day consulting and support.
  - Software licensing compliance for small to large companies. This is becoming more important as software vendors are focusing on licensing compliance.
  - Created disaster recovery plans for several companies since 2000.
- Served as a member and/or consultant to companies board of directors:
  - Property Casualty Insurance Company (2), Member
  - General Insurance Agency/Broker, Member
  - National Trade Association, Consultant
  - Local Trade Association, Consultant
  - Local Private School, Member, President
  - Loss Management Company, Member, Consultant
  - Internet Service Provider Company (2), Member,(VP)
  - Product Distributor, Consultant
  - Manufacturer Special Retail, Member
  - Entrepreneurial Association, Co-founder, President, Member