

**John R. O'Brien, B.A., MSt. - Senior Research Consultant**  
Senior Associate - Alleyne Inc.

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An accomplished professional senior Technology Research Analyst with significant project management expertise. Demonstrated in-depth understanding and expertise in various aspects of technology management related to the financial services market in Canada, including banking, insurance and capital markets. Expert understanding of Information Technology industry and company trends relevant to financial services and insurance companies; skilled at providing analysis, 'points of view' and key recommendations. Developed strategic frameworks for evaluating Canadian banks' approach to technology, using a variety of qualitative research methods and tools.

**BUSINESS EXPERIENCE:**

**Research Consultant**, Self-employed Consultant 2002-Present  
*Clients have included:* CIBC, Faculty of Information (University of Toronto), Canadian Association of Accredited Mortgage Professionals, Durham College [Legal Research and Information Management Program]

In parallel with these consulting opportunities, the following roles were also performed within market research, academia and a Bay Street law firm working on a variety of projects and new business ventures.

- Conference Developer, Insight Information 2014-2015
- Senior Analyst, IDC Financial Insights 2011-2012
- Analyst, BT Knowledge Management, Rogers Communications Inc. 2010
- Project Coordinator, KM
- Project Manager, BLG Canada [national law firm] 2004-2008
- Research Analyst, Ekos Research 2001-2002
- Research Analyst, Bank of Montreal 2000-2001
- Instructor, XML (eXtensible Markup Language) Course, University of Toronto 2000-2005
- Consultant, Crucible Management Solutions Inc. 1998-2000

**SKILLS:**

**Financial Services Technology Research Analyst**

- Responsible for managing Canadian Financial Advisory Service technology research program including the regulatory environment within which they operate
- Produced research related to the identification of key trends within the financial services marketplace both within Canada, and as part of a global team of analysts
- Developed in-depth understanding and expertise in various aspects of technology related to financial services market in Canada, including banking, insurance and capital markets
- Summarized industry and company trends relevant to financial services company, providing 'points of view' and recommendations
- Developed strategic framework for evaluating Canadian banks' approach to technology, using a variety of qualitative research methods including internet research
- Wrote reports based on research into various approaches to regulation within each of the provinces for a provincially regulated financial services profession

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### Conference Developer – Research/Thought Leadership Events

- Responsible for researching key market and economic trends with Senior Management from Corporate Canada to identify emerging trends of interest to specific markets that would meet revenue targets
- Developed conference agenda and brochure copy for conferences on Canadian Legal Technology, Securities Law (in Calgary), Aboriginal Law (in Ottawa), Canadian Airline Investments
- Recruited Faculty for events that included selecting experts on given topics of relevance to the Conference from across the country
- Communicated with numerous stakeholders including Law Firm Management teams and General Counsel from Canada's largest companies
- Co-ordinated with marketing, sales and operations to reach target market for events
- Assigned the task of managing an event that had been run for more than 25 years, chaired by a senior legal professional

### Consulting

- Responsible for managing portfolio of technology projects and coordinating work of management committees
- Created an XML working group that included members from professional services firms, the financial services sector and the IT industry produced series of public lectures to further inform the group of emerging trends in XML and presented to an industry of insurance companies

### Publications

IDC Reports

Healthcare

"Primary Healthcare in Canada: Technology Adoption, Drivers, and Investment." (November 2008.)

Financial Services

"Canadian Financial Services Sector IT Spending 2012-2016 Forecast." (co-authored, December 2012.)

"Perspective: Payments – Setting the Stage in Canada." (co-authored, December 2012.) "Business Strategy: Canadian Capital Markets." (April 2012.)

"In the Era of Big Data, Analytics Is Key to Fighting Fraud." (co-authored, April 2012.)

"Business Strategy: Trends in Canadian Banking." (January 2012.)

"Business Strategy: Global Risk Roundtable — Insights from IDC's Global Risk Analyst Team." (January 2012.)

"Worldwide Financial Services 2012 Top 10 Predictions: Thriving or Just Surviving?." (co-authored, December 2011.)

"Business Strategy: Trends in Canadian Insurance." (October 2011.)

"Canadian Financial Services Sector 2011–2015 IT Spending Forecast." (October 2011.)

"IBM Expands Risk Management Offerings Yet Again with the Acquisition of Algorithmics." (September 2011.)

"Perspective: Adoption of Online and Mobile Banking by Canadians." (August 2011.)

"SAP's Industry Analyst Base Camp." (co-authored, July 2011.)

**Education**      **University of Toronto**, Master of Information Studies, Library and Information Science and Bachelor of Arts

Canadian Securities Course, Fundamentals of Market Research