

Martin Geffen*Vice President, Gartner Consulting*

Martin Geffen has more than 30 years of experience in consulting to clients on the most effective use of, and planning for, information technology. Mr. Geffen's practice has focused on a wide range of technology planning, architecture, design and implementation issues. His areas of specialty include IT strategic planning, governance, risk assessment and management, and organizational design.

Mr. Geffen has worked extensively with federal and provincial and state departments in the U.S. and Canada, and with Fortune 500 clients across North America. He has provided advice to a wide range of organizations including healthcare providers, financial services institutions, manufacturers; and life and health, property and casualty insurers in the United States, Canada and Latin America.

Some of Mr. Geffen's consulting experience includes:

- Developed go-to-market plan for an Asian technology company for the introduction of a new electronic health record system into the North American market.
- Assessed and developed call center strategies and change programs for a Canadian financial services organization, a telecommunications provider, and for one of the largest healthcare payers in North America.
- Assisted a large managed care provider in the United States to develop and manage an RFP process to acquire claims processing, underwriting and case management systems
- Assisted a large multinational bank to develop and manage an RFP process to acquire front- and back-office systems for a number of functional areas.
- Developed the plan, partnerships, operating agreements and design for a consortium to deliver full scale electronic commerce (e commerce) services to the creditors, regulators, trustees and other stakeholders involved in the bankruptcy and insolvency community in Canada.
- Developed IT Strategies, operational, and service delivery plans, and conducted technology reviews and project reviews for a range of Canadian and US Provincial and State and Federal agencies (including Worker Compensation in New York, Ohio, North Dakota, Social Services Administration, NYS Office of Temporary and Disability Assistance, Alberta Ministry of Health, Ontario Ministry of Health, Canadian Federal Department of Health, Canadian Department of International Development, among others).
- Developed five year information technology strategic plan for Canadian Blood Services
- Led a number of projects in support of modernizing and replacing State-wide Medicaid information technology solutions
- Provided ongoing strategic level oversight, and project level structured risk and benefit assessments for a wide range of public entities including health care providers, Medicare and Medicaid enterprises, workplace safety and insurance organizations, automobile registration and driver licensing organizations, and state-based automobile insurance organizations
- Led a large number of projects in support of New York City Health and Hospitals Corporation (NYC HHC). For these projects, Martin led Gartner teams to develop an overall IT strategy, develop and implement a program management office, develop

overall processes and support for ongoing governance of the IT project and investment portfolio leading to more-effective decisions on higher-value-add investments in technology-enabled projects, conduct requirements, planning and evaluation for a new hospital information system selection

- For Canada Health Infoway — conducted a number of engagements, including:
 - Working with a team of staff and external consultants, developed the initial business plan and overall strategy.
 - Developed a benefits evaluation measurement and reporting framework.
 - Developed a strategy and recommended initiatives for the creation of a nationwide network to support the ordering, dispensation and management of prescription pharmaceuticals.
- For a provincial workplace safety and insurance board — completed a number of engagements including:
 - Completion of an independent validation and verification (IV&V) study and provided ongoing advice to the chair and the board of directors.
 - Performed an independent assessment of the organization's IT-enabled transformation plan and program.
 - Assessment of planning and ongoing operations of a significant case management system selection and implementation program.
 - Developed strategies for case management, knowledge management, provider management and payments, and ERP to acquire technology and business solutions to meet these needs.
 - Development of an overall IT strategy.
 - Capability assessment of senior IT leadership team.
- Developed a provincial program for the utilization of technology in the home to support elders-at-risk.
- Developed a Web strategy for a Canadian standards association, with a significant focus on content management, document management and publishing.
- For one of North America's largest property and casualty insurers — developed and validated a business case for the acquisition and implementation of customer-facing, dealer- and agent-facing, and internal portals. Provided the client with basic advice for building on the business case and moving into the acquisition process.
- For a city's department of homeless services — provided oversight and direction for a large-scale program to transform case management and service delivery.

Mr. Geffen graduated from the University of Toronto with an engineering (B.A.Sc.) degree, and also obtained an MBA from York University.

Martin is a leader in the Gartner Canadian Public Sector practice and led the Gartner Canadian consulting practice prior to returning to focus more fully on client delivery. Martin chaired the Information Technology Steering Committee for the Heart and Stroke Foundation of Ontario, is a past-chair of the Workflow Special Interest Group for the Canadian Information Processing Society (CIPS), and has lectured on strategy and applications of technology in the Schulich MBA program at York University in Canada.