

Toolie Merchant

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Agile Transformation and Consulting

Summary: I specialize in Agile Transformations, establishing and enhancing software development organizations. I have a broad range of experience in Agile Leadership, Project Management, Program Management, Product Management, data projects, and cloud computing. I bring emotional intelligence and expert verbal communication skills to the role, along with the best ideas from successful software companies. I can deliver improvements to your teams in weeks, not months.

Work Experience

Tooliedotter Inc

03/2001 - Present

Chief Consultant and Business Analyst

Tooliedotter Inc. provides business strategy and process analysis, technical project management, content marketing, and product marketing consulting experience, optionally using remote work skills and techniques.

• Current Projects

- ▶ Grant County Beat (newspaper) (2010-present): Business analysis, business strategy, and IT services including AWS/EC2.
- ▶ Leslie Canham & Associates (2012-present): Business strategy and IT services including AWS/EC2.
- ▶ Reflexology Association of America (non-profit) (2023-present): Business strategy and IT services.
- ▶ Congo Peace (non-profit) (2022-2025): IT services and web design.
- ▶ Remote Scrum Study (2023-present): Authorized Training Partner and instructor, including AWS/EC2.

- **Business Consultant/Analyst:** Collaborated with over 120 individual entrepreneurs, small businesses, and nonprofit associations. Identified client needs, including coaching executive leadership around strategic goals, and identifying opportunities, strategic objectives, and results-oriented business goals. Developed and implemented process improvements in their business lifecycles, including go to market product strategies, sales enablement, and customer satisfaction.
- **AI-Enabled Development:** Leveraged development experience and skills with artificial intelligence (AI) tools like ChatGPT to create and implement custom reports and other data retrieval operations using REST APIs. Designed and wrote AI-assisted utilities for myself and for clients.
- **Technical Advisor:** Provided technical knowledge and stakeholder management, made strategic recommendations, provided project planning, and delivered technical solutions. Developed strong relationships that yielded repeat client business. Increased adoption and user engagement, value creation, member retention, and improved business outcomes.

Alaska Airlines

05/2024 - 04/2025

Sr. Scrum Master/Agile Master Coach

- **Agile Coach:** Spearheaded company-wide Agile coaching and mentorship for a team of 18 scrum masters. Provided senior leadership, subject matter expertise, strategic thinking, and negotiation skills; encouraged servant leadership styles, conducted team-building activities, and strengthened interpersonal communication skills. Supported strategic initiatives, enabled consistency, improved performance, refined decision-making, enhanced problem solving skills, culture building, and cross functional collaboration.
- **Agile Methodology Training:** Curated and improved existing Agile Methodology coaching and mentoring content to educate teams, and support team development. Prepared training plans and materials and conducted workshops for onboarding. Created a SharePoint site for training materials, documenting current practices and guidelines, and creating templates and checklists. Created a feedback loop, then consolidated, deduplicated, and edited 10 working agreements into an optimized single working agreement.
- **Sr. Scrum Master:** Orchestrated multiple enterprise-level, high performing teams working on mobile application development. Conducted Scrum events (Sprint retrospectives, standups, refinement, reviews, etc.), managed Sprint backlogs, defined and tracked key metrics, managed risk, guided story point estimation, anticipated complex problems, resolved issues, fostered relationships, and held teams accountable. Choreographed quarterly planning for 6 teams, working in collaboration with other teams and internal stakeholders. Leveraged AI and REST APIs to develop custom dashboards and reports using AWS/EC2.

Starbucks (Corporate)

08/2023 - 04/2024

Sr. Scrum Master

- **Agile Transformation:** Optimized change management plans for this retail giant, mentored other Scrum Masters, trained Scrum teams, and defined team goals along with Agile software development practices and standards. Collaborated with key stakeholders, monitored scope and project schedules, optimized process flows, and encouraged continuous improvement. Created custom reports using AWS/EC2 instances and services.
- **Business Process Improvement:** Investigated internal processes in IT to improve operational excellence and establish communication channels. Interviewed internal team members to understand team motivation, and how to streamline their information systems and their software development life cycle (SDLC). Conducted business process mapping, negotiated working agreements to address competing priorities and improve collaboration, resulting in a better flow of application development work, risk mitigation, and improved cross-functional team effectiveness.

Expeditors Helo Team

05/2022 - 03/2023

Sr Scrum Product Owner/Scrum Master

- **Agile Coach:** Mentored team leads in creating an Agile environment, including Scrum practices, while establishing administrative and other policies. Drove organizational change and efficiency by implementing Azure DevOps (ADO).
- **Project Co-Ownership:** Accelerated this early-stage, fast-paced Strategy and Innovation Team project that was building a supply chain management SaaS product. Contributed to top-level business cases, strategic roadmaps and goals, a RACI matrix, customer value propositions, and timelines. Prioritized features based on research, competitive analysis, user personas, visual design, specifications, metrics, use cases, scope of work, and more. Used APIs and AWS/EC2 instances for analysis.
- **Cross-team Collaboration:** Partnered with the Data Science team on data mapping of external source data into the existing data infrastructure. Advocated as voice of the customer, acquiring user feedback, and prepping for user onboarding.

Boeing Global Services

03/2022 - 05/2022

Release Train Engineer (SAFe) and Agile Coach

- **Agile Coach:** Analyzed the effectiveness of 5 SAFe teams, identifying strengths and weaknesses, and coaching leads on portfolio management, product leadership, decision-making, conflict resolution, and continuous delivery improvements. Coordinated and mentored knowledge-sharing demos.
- **Release Train Engineer (RTE):** Drove quarterly PI planning for a Scaled Agile Framework ART team of over 100 people. Coordinated with the Development manager on Azure DevOps (ADO) best practices, backlog alignment, and team engagement; with the project manager (PMO) on scheduling; and with management for on-boarding.

Expedia Group

10/2021 - 03/2022

Sr. Technical Program Manager and Agile Coach

- **Agile Coach:** Partnered with the executive sponsor on a vision and strategy for improvements to their software engineering intake process, transforming it with Scrum principles and behaviors. Created and presented comprehensive Scrum training to 6 teams of software and data engineers, as well as to a team of technical program managers.
- **Sr. Technical Program Manager:** Optimized a big data lineage/data catalog infrastructure project within the Ad-Tech development team to interoperate and integrate with data lakes, data warehouses, relational databases, and other forms of data analysis. Collaborated across data engineering teams to facilitate data transfers, data governance, and data quality across the enterprise.

98point6 Telemedicine

04/2021 - 08/2021

Scrum Master/Product Owner

- **Scrum Master/Agile Coach:** Shipped an electronic health records (EHR) pharmacy benefit management (prescriptions) feature ahead of schedule. Accelerated Scrum practices based on Atlassian Jira, and project tracking on Asana. Cleaned up the backlog, helped establish a delivery pipeline, addressed technical debt, and taught the team how to more effectively use Jira.
- **Data Mapping:** Mapped the data integration protocols between multiple services. Worked with industry standards such as HL7, FHIR, and data formats (blobs, CSV, JSON, SQL, etc.) for three additional product features to aid rapid technical design.

Providence Health Patient Marketing

08/2020 - 03/2021

Sr. Technical Product/Scrum Manager

- **Scrum Master:** Orchestrated the integration of a cloud-native architecture tool on Snowflake with a new SaaS marketing platform. Established a new Scrum practice based on Microsoft Azure DevOps, including Scrum events. Coordinated with the larger DevOps practice within the company.
- **Data Management/Governance:** Documented a massive master data management tool that ran data conversion extract/transform/load (ETL) operations, patient identity matching, data hygiene, and deduplication of over 7 million records. Leveraged my technical writing and document processing skills to deliver a 300-page online, as-built reference. Tracked personnel, vendor sources, and per-table connections using Oxygen XML and related tools.

JPMorgan Chase Commercial Real Estate

03/2019 - 02/2020

Sr. Technical Analyst & Project Manager

- **Agile Coach:** Scaled coaching for a real estate software development organization of 115 people with distributed teams across the US and India. Coordinated knowledge-sharing sessions, and drove improvements in CI/CD, staff tracking, management, and education. Trained Scrum teams on the best use of their tracking tools.
- **Agile Project Management:** Optimized an IT product portfolio of internal software tools. Coordinated a \$2.2 million budget for staff capacity planning. Measured and tracked OKRs, KPIs and other success metrics; produced executive-level reports for CTO/CIO-level leadership. Partnered with Finance and Strategy stakeholders for product roadmaps, forecasting, Key Performance Indicators (KPIs), program scope, resource planning, vendor management, and accurate tracking and reporting.

Providence Health Digital Innovation Group

05/2018 - 03/2019

Sr. Product Manager/Scrum Master/Agile Coach

- **Senior Data Project Manager:** Spearheaded the day-to-day strategy and implementation of a large-scale website consolidation and data migration across an entire health system of 875 hospitals and clinics. Improved the network automation of incoming data to improve service management. Coordinated with multiple stakeholders (technical and non-technical), collaborated on a go-to-market (GTM) and Google Analytics strategy, and defined transition plans to consolidate content.
- **Scrum Master/ Agile Coach:** Developed project strategies, wrote and assembled requirements, identified KPIs, set up task tracking using Atlassian Jira and Confluence. Collaborated with internal and external stakeholders to define schedules; established consistent stakeholder communications; and set up content tracking using Smartsheet. Trained team members on Agile/Scrum principles and conducted regular Scrum events.

Bridge Partners Consulting

08/2016 - 03/2018

Sr Technical Product Owner/Scrum Master

- **Senior Technical Product Owner:** Researched potential professional services product offerings for clients, conducted strategic planning sessions for products, and wrote messaging and positioning documents for relationship management. Designed the product lifecycle management system and overall team workflows, established task-tracking and communications using Atlassian Jira and other products.
- **Scrum Master/SME:** Optimized several projects that prepared go-to-market content for our client's partner platform, and created, to client satisfaction, use-case based content to support their marketing strategy. Established and organized Agile practices for the Marketing team, trained team members, drove adoption, conducted Scrum/Kanban events, and served as subject-matter expert (SME) for a team of 25 consultants working for our Amazon Web Services (AWS) client.

Disney Interactive Media

04/2016 - 06/2016

Internal Technical Communications PM

- **Technical Marketing Analysis:** Delivered an internal marketing campaign for the senior enterprise architect to bring developers into program compliance. Analyzed existing processes to identify coverage gaps, assessed the usability of the existing system, and recommended streamlining of workflows prior to the start of the campaign.
- **Internal Communications:** Authored communication strategies, including digital media branding, imagery, and accompanying themes. Delivered omnichannel marketing collateral, restructured the documentation, rewrote existing content, and redesigned and enhanced their Confluence site.

Technical Communications Program Manager

- **Technical Data Program Manager:** Spearheaded a plan to create consistent outbound messaging to prospects and customers for this early-stage Big-Data platform project. Delivered corporate content, including slide decks, booth demos, hands-on labs, online self-paced training, in-person training programs, standard documentation, and technical materials for marketing purposes.
- **Internal AWS Expert:** Researched, analyzed, and initially managed AWS assets for the company, training employees as needed, and serving as an ongoing technical resource. Collaborated directly with AWS on solutions to move SpaceCurve's infrastructure from bare metal to microservices, and tracked subsequent spending.

Education

Wheaton College · Bachelor's Degree

Wheaton IL

Calif. State University · Master's Degree

Fullerton

Skills

- **Top Skills:** Certified Scrum Master, Certified Scrum Product Owner, Certified Scrum Teacher, Certified Agile/Scrum Coach and Startup Specialist, Atlassian Jira and Confluence Design, Implementation, and Management (power user), Microsoft Azure DevOps Implementation and Management
- **Agile Methodologies:** Scrum, Kanban, SAFe
- **Programming Languages and Tools:** Project Management Software – Clarity PPM and related tools, Programming: – PHP, HTML, CSS, XML, XSL, XSLT, Markdown, Microsoft Office, Excel, PowerPoint, Microsoft Word, Javascript, C++, Microsoft Project, Jira, Azure DevOps, Confluence, Google Cloud, Github, Microsoft Visio
- **AI/ChatGPT Skills:** ChatGPT Prompt Engineering, Research, Content Generation, and Customization, Software Code Problem-Solving

Certifications

Certified Scrum Product Owner, Certified Scrum Master, Certified Scrum Trainer, Authorized Training Partner

SCRUMstudy.com

Community College Lifetime Instructor Credential #369747

State of California

Board Leadership & Engagements

National Speakers Association

04/2001 - Present

Professional Member, Seattle Chapter Past President, and National Leadership Team Member

Publications

Practical Scrum YouTube Channel

youtube.com/@tooliem