

Brian D. Morin

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Technology Strategy, Portfolio & Program Executive | Transformation, Investment & Enterprise Execution

Senior technology portfolio, program, PMO, and transformation leader with 20+ years connecting enterprise strategy to disciplined execution. Builds operating models that align priorities, investment, capacity, governance, roadmaps, delivery health, and decision ownership across business and technology. Brings deep experience in strategic portfolio leadership, financial and resource decision support, large-scale technology transformation, PMO and people leadership, and executive operating mechanisms that improve transparency, execution, and measurable outcomes.

EXECUTIVE HIGHLIGHTS:

- **Strategy, Portfolio & Investment Leadership:** Led the Enterprise PMO for a \$200M enterprise portfolio, with direct responsibility for the Non-Negotiable, Data, and Technology portfolios representing approximately \$115M in combined annual investment. Improved overall portfolio performance by 71% and forecast accuracy by 51% through stronger portfolio health, intake, prioritization, funding and resource gates, escalation, and decision accountability.
- **Technology Transformation & Enterprise Execution:** Led a Commercial Banking technology transformation across 14 Agile squads, more than 100 engineers, six platforms, and an initial 14 Scrum Masters. First-year outcomes included a 35% improvement in average delivery velocity, 51% improvement in delivery predictability, 37% reduction in average user-story cycle time, and 18% improvement in Agile maturity.
- **Operating Model, PMO & People Leadership:** Built and scaled enterprise operating models across portfolio, PMO, and technology delivery environments, including an Enterprise PMO averaging approximately 60 people. Simplified governance, strengthened executive decision mechanisms, and developed leaders and practitioners through clearer roles, standards, coaching, and operating rhythms.

PROFESSIONAL EXPERIENCE

Bank of Montreal (BMO) | Toronto, ON / Pleasanton, CA

Director, Commercial Banking Technology Strategy & Transformation | 10/2023 – 06/2025

Led a Commercial Banking technology transformation across 14 Agile squads, more than 100 engineers, six platforms, Product Owners, Technology leaders, and an initial 14 Scrum Masters. Established common operating practices across planning, capacity, roadmaps, delivery measurement, dependencies, risks, escalation, Product alignment, and executive reporting to improve execution discipline and decision confidence.

- Improved average delivery velocity by 35%, delivery predictability by 51%, and average user-story cycle time by 37%, from approximately eight days to five days, during the first year of the transformation; Agile maturity improved 18%.
- Established a measurable delivery operating system spanning Jira workflows, Epic and user-story estimation, capacity planning, Definitions of Ready and Done, roadmaps, dashboards, dependency and risk ownership, escalation paths, and continuous-improvement coaching.
- Centralized and directly led an initial 14 Scrum Masters, establishing role clarity, a recurring Scrum Master Guild, individual coaching, shared standards, and a formal Coaching and Calibration Rubric.
- Automated Jira-to-Confluence executive reporting to reduce recurring manual reporting effort and improve visibility into delivery health, risks, dependencies, predictability, and execution trends.
- Ran a separate human-reviewed Microsoft Copilot backlog-preparation pilot that reduced finalized user-story preparation from approximately 90 minutes to 5 minutes and increased 90-minute refinement-session throughput from one or two stories to approximately 10 to 15.

Bank of the West (BNP Paribas) | San Francisco, CA

Senior Vice President, Enterprise PMO | 07/2018 – 10/2023

Led the Enterprise PMO for a \$200M enterprise portfolio, with direct responsibility for the Non-Negotiable, Data, and Technology portfolios representing approximately \$115M in combined annual investment. Led through an organization averaging approximately 60 people while strengthening portfolio governance, executive decision mechanisms, and delivery standards across Business and Technology.

- Improved overall portfolio performance by 71% by the end of the first year and portfolio forecast accuracy by 51% through objective portfolio-health standards, transparent reporting, stronger intake and prioritization, funding and resource gates, faster issue and dependency resolution, clearer decision accountability, and disciplined change control.

- Created \$43M in annual investment capacity by year three in the Risk Management Non-Negotiable portfolio, reducing the annual investment requirement from approximately \$61M to \$18M through disciplined intake, prioritization, demand challenge, funding governance, and decision accountability.
- Simplified enterprise delivery governance across Waterfall, Scrum, Kanban, and hybrid methods, reducing required PDLC and SDLC artifacts by approximately 70%; the broader delivery-system redesign improved project duration by 50% across the enterprise portfolio.
- Led through a tiered organization averaging approximately 60 people. A representative direct-report structure included three VPs or Portfolio Managers and two Program Managers, with broader Program Manager, Project Manager, Project Coordinator, and Scrum Master roles across full-time, contractor, and contingent staff.
- Led the Technology and Operations acquisition workstream across 16 work packages, evaluating 600 applications for Legal Day 1 and coordinating Conversion Day 1 tasks for 400 of those applications while all 600 were shut down, with zero unexpected production outages and zero customer impact.

Vice President, Head of Compliance PMO | 10/2015 – 07/2018

Built and scaled the Compliance PMO following a regulatory recommendation to separate Compliance from Risk, establishing portfolio governance, investment oversight, reporting, delivery controls, and a blended organization of approximately 20 people during normal operations and approximately 30 at peak.

- Established the Enterprise Compliance Program Management Office and governed approximately \$45M to \$48M in annual Compliance investment, including disciplined review of demand, ownership, funding, and benefit commitments.
- Governed approximately 500 inherited open regulatory issues, including regulatory findings and MRAs and excluding MRBAs; over approximately two years, regulators formally accepted or closed approximately 80% of the combined inherited population, while oversight cadence moved from quarterly to annual.

Wells Fargo Bank | San Francisco, CA

Vice President, Community Bank Technology | 05/2010 – 10/2015

Held expanding leadership responsibilities across technology risk governance, quality assurance, release management, application security, and customer-facing banking technology.

- Built and led a cross-functional team to design and implement a Dynamic Application Security Testing program for digital-channel applications, integrating automated scanning into CI/CD pipelines and establishing governance and reporting to strengthen vulnerability detection across customer-facing platforms.
- Led continuous quality-improvement initiatives across Quality Assurance, Release Management, and Development, strengthening testing, automation, defect resolution, and release practices.

Wells Fargo Bank | San Francisco, CA

Consultant, Internet Services Development | 10/2009 – 05/2010

JPMorgan Chase | San Francisco, CA

Vice President, Debit & Credit Card Fraud Division | 03/1999 – 07/2009

Established the first formal PMO within Fraud and Operations, directed multimillion-dollar initiatives with budget controls and executive reporting, and managed and mentored eight Project Managers through structured performance goals, development plans, and delivery coaching.

EDUCATION

Bachelor of Science (BS), Business Management | University of Phoenix

CORE CAPABILITIES

Strategy, Portfolio & Investment: Technology Strategy | Strategic Planning | Enterprise Portfolio Management | Investment Governance | Intake & Prioritization | Capacity Planning | Funding & Resource Decisions | Portfolio Health | Executive Decision Support

Program, Transformation & Enterprise Execution: Enterprise Program Management | Technology Transformation | Roadmap Execution | Product & Engineering Alignment | Agile & Hybrid Delivery | Risk & Dependency Management | Governance Simplification | Change Leadership

Operating Model, PMO & Organizational Enablement: PMO Transformation | Operating Model Design | Executive Operating Rhythms | Delivery Analytics | Reporting Automation | AI-Enabled Workflow Improvement | Organizational Design | Coaching & Talent Development

CERTIFICATIONS

PMI-PMOCP | SAFe 6.0 Agilist | SAFe 6.0 Lean Portfolio Manager | Certified Scrum Master (CSM) | Google AI Professional Certificate