

Brian D. Morin

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Executive Portfolio, PMO & Technical Program Management Leader | Transformation, Value Realization & FinTech / Technology Execution

Executive Portfolio, PMO, and Technical Program Management leader with 20+ years building operating models that connect strategy, technology execution, investment governance, and executive decision-making. Led a \$200M+ enterprise portfolio, 60+ project professionals through tiered leadership, and delivery transformation across Technology, Product, Finance, Risk, and Operations. Known for improving portfolio performance, forecast accuracy, delivery speed, and value realization through disciplined intake, prioritization, Agile and hybrid delivery, KPI dashboards, and executive operating rhythms.

EXECUTIVE HIGHLIGHTS:

- **Portfolio Strategy & Value Realization:** Led strategic portfolio planning and governance for a \$200M+ technology-enabled portfolio, improving portfolio performance by 71% and forecast accuracy by 51% through disciplined intake, prioritization, executive dashboards, and value-based decisioning.
- **PMO / TPM Operating Model Leadership:** Established and scaled Enterprise and Compliance PMOs, standardizing governance, operating rhythms, delivery playbooks, KPI reporting, and cross-functional prioritization across Technology, Product, Finance, Risk, and Operations.
- **Portfolio-to-Engineering Execution:** Modernized Agile and hybrid delivery across 14 Agile squads and 100+ engineers, improving velocity by 35%, reducing cycle time by 37%, and increasing Agile coaching coverage from 36% to 100% through Jira governance, delivery metrics, and dependency management.
- **M&A, Risk & Regulated Transformation:** Led high-stakes transformation across M&A, compliance, and regulatory environments, including Legal Day 1 and Conversion Day 1 readiness for the \$16.3B BMO acquisition, governance supporting remediation of 500+ regulatory findings, and oversight cadence improvement from quarterly to annual.

PROFESSIONAL EXPERIENCE

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

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

Led technology transformation across Commercial Banking, strengthening portfolio-to-engineering execution across 14 Agile squads, 100+ engineers, Product Owners, and Senior Technology Owners. Built operating rhythms, delivery metrics, Jira governance, and dependency management practices to improve speed, predictability, transparency, and audit-ready execution in a regulated technology environment.

- Modernized Agile and hybrid delivery across 14 squads and 100+ engineers by standardizing Jira workflows, delivery governance, prioritization practices, and cross-squad dependency management, driving a 35% improvement in velocity.
- Established real-time KPI dashboards and Jira-to-Confluence reporting automation, reducing manual executive reporting effort by 8 to 12 hours every two weeks and improving visibility into delivery health, risks, dependencies, and execution trends.
- Redesigned the Scrum Master operating model, increasing Agile coaching coverage from 36% to 100% across 14 squads while improving consistency in planning, ceremonies, delivery discipline, and continuous improvement.
- Reduced delivery cycle time by 37% by strengthening backlog readiness, sprint execution, dependency visibility, and operating cadence across Product and Technology teams.
- Piloted Microsoft Copilot to accelerate Epic and User Story drafting for Jira backlogs, improving sprint readiness, documentation quality, and repeatability of backlog preparation practices.

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

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

Led the Enterprise PMO and strategic portfolio governance for a \$200M+ portfolio spanning technology modernization, compliance transformation, enterprise risk, business enablement, and M&A integration. Built executive operating rhythms, intake and prioritization models, investment governance, delivery standards, and performance reporting to improve transparency, value realization, forecast accuracy, and portfolio execution across Technology, Product, Finance, Risk, Operations, and executive leadership.

- Unified fragmented PMO structures into a centralized enterprise governance model, improving visibility, prioritization, funding discipline, and executive oversight across a \$200M+ strategic portfolio.
- Improved enterprise portfolio performance by 71% by redesigning governance routines, intake standards, executive reporting, and OKR-aligned portfolio controls.
- Increased forecast accuracy by 51% by strengthening resource gating, delivery guardrails, program standards, and executive

visibility into risk, capacity, funding, and sequencing decisions.

- Reduced Risk Management portfolio funding needs by \$43M over 3 years through disciplined intake, prioritization, decision rights, funding governance, and improved alignment between investment demand and enterprise capacity.
- Reduced average project duration by up to 50% and delivery artifacts by 70% by simplifying PDLC/SDLC governance, institutionalizing Lean delivery standards, and balancing speed, control, and auditability.
- Led enterprise PMO governance for Legal Day 1 and Conversion Day 1 during the \$16.3B BMO acquisition, updating 600+ applications for Legal Day 1 and converting approximately 400 applications for Conversion Day 1 with zero downtime and regulatory continuity.
- Scaled PMO execution through tiered leadership across 60+ project professionals, including Program Managers, Project Managers, Technical Program Managers, Scrum Masters, and PMO leaders.

Head of Compliance PMO | 10/2015 – 07/2018

Recruited to establish the bank's first Compliance PMO following a regulatory mandate to separate Compliance from Risk. Built and scaled the function across governance, reporting, portfolio oversight, risk management, technology delivery coordination, and regulatory remediation, leading 20 to 30 project professionals across direct, dotted-line, and contingent resources.

- Built the Compliance PMO from the ground up under OCC and FRB oversight, establishing governance, reporting, risk management, and delivery controls to remediate 500+ regulatory findings across Compliance and BSA/AML.
- Reduced open findings by 80% within two years, helping restore examiner confidence and move regulatory oversight cadence from quarterly to annual.
- Expanded the PMO into an Enterprise Compliance Program Office overseeing \$48M+ in compliance-related spend and partnered with the CCO and COO to reclassify \$95.6M+ in non-regulatory investments.
- Established a full PMO service model covering governance, portfolio analytics, risk management, change enablement, stakeholder engagement, regulatory reporting, and compliance technology delivery coordination.

Wells Fargo Bank | San Francisco, CA

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

Held expanding leadership roles across technology risk governance, quality assurance, application security, and digital-channel delivery. Led cross-functional execution across business, technology, risk, QA, and security teams supporting customer-facing banking platforms.

- Built and led the Dynamic Application Security Testing program, coordinating one program manager and four application security testers to strengthen protection of customer and bank financial data across digital channels.
- Led technology risk, QA, and release-readiness initiatives across customer-facing banking platforms, improving governance, defect management, stakeholder alignment, and delivery quality across digital-channel workstreams.

Additional Experience: **Consultant, Internet Services Development** | 10/2009 – 05/2010 | Wells Fargo Bank | San Francisco, CA

Vice President, Debit & Credit Card Fraud Division | 03/1999 – 07/2009 | JPMorgan Chase | San Francisco, CA

EDUCATION

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

CORE CAPABILITIES

Portfolio, Value & Governance: Enterprise Portfolio Management | Strategic Portfolio Planning | Investment Governance | Benefits Realization | Intake & Prioritization | Capacity Planning | Funding Discipline | Executive Value Storytelling

PMO, TPM & Delivery Systems: Technical Program Management | PMO Formation | Operating Rhythm Design | Delivery Playbooks | KPI Dashboards | Decision Rights | Executive Scorecards | Cross-Functional Prioritization

Transformation & Execution Leadership: Agile & Hybrid Delivery | SDLC/PDLC Governance | Roadmap Execution | Dependency Management | Change Management | M&A Integration | Risk & Compliance | Operational Readiness

TOOLS & PLATFORMS

Jira, Jira Advanced Roadmaps, Confluence, Planview, Clarity PPM, Power BI, Microsoft 365, Teams, Slack, Microsoft Copilot, ChatGPT, Claude

CERTIFICATIONS

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