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OBJECTIVE

TCPA & Telecom Expert Witness, Senior IT management consulting, contact center technology projects, and technical project leadership engagements.

HIGHLIGHTS

- **Expert Witness** in Call Center/Contact Center voice and related web technologies including **TCPA** cases
- **TCPA Skills:** Predictive Dialer gear; class declarations; phone number scrubbing (mobile/landline) for class definition; expert reports
- 25+ years professional IT and **Bell Labs** experience
- Call Center Management consulting, **assessments**, requirements analysis/design/documentation, product development and large IT project management success
- Technology assessment including remediation and project management intervention
- **Intel's** Telephony Strategic Planner while on loan from Bell Labs
- **Yale** English degree; MS-Computer Science (Stevens)
- **CTO** experience in telephony technology companies
- Expert in management of **RFP** authoring and execution
- Strong **Strategic and Tactical IT planning** and execution experience
- Strong technical leadership and personnel development skills
- Expert in network technology including VoIP evaluation, selection and implementation
- **Public Sector Clients:** FEMA; California State (Employment Development Division (EDD), Department of Motor Vehicles (DMV), Department of Managed Healthcare (DMHC))
- **Private Sector Clients include:** Vonage; Intel; BP; HP; Agilent; ARCO; JCL
- **Law Office Clients include:** Covington & Burling; Heller-Ehrman; HSE Law; Friedman Law; Donato, Minx, Pool & Brown; Kazerouni Law Group
- Verticals: Healthcare, Energy, Public Sector (Federal/State), Technology Companies, Legal (TCPA)

KEY SKILLS

Communications:	Yale-trained. Excellent written/verbal/presentation skills
Expert Witness:	Katz matter, for plaintiff (success), deposed twice; affidavits; SaaS case (pending) (to include deposition, expert report, rebuttal and testimony); OM Lodging, for defense (PBX); Raffin matter, for plaintiff (ATDS + Call Recording).
Business:	ROI analysis; CxO relationship management; RFP management; vendor management; data analysis
Project Mgmt.:	Private Sector, Public Sector, MS-Project, estimation, financial controls
Call Center Infra:	Avaya PDS, Avaya PBX S8700 (VoIP), Avaya ATDS, Rolm 9751, Interactive Intelligence Call Center suite (I3) (VoIP), Cisco, Mitel, Aspect ACD, Genesys, Voice Mail, IVR, Witness, NICE (QA), WFM (I3, Aspect), Sonus, Nuance IVR
Customer Apps:	Siebel on Demand, WFM, Call Recording (Nice/Verint (Witness)/I3), Process Automation, Call Routing, IVR call flow
Facilities:	Greenfield site prep, construction mgmt., IT operations
Networking:	TCP/IP, Citrix, traffic-load and distributed systems analysis, cellular, WiFi, network security

PROFESSIONAL EXPERIENCE**TELEMEISTER STRATEGIC SERVICES, LLC****June 1998 - Present**

CEO, Senior IT Management Consultant, Expert Witness and principal in telecommunications and Call Center consulting company delivering project management, telecom analysis, telecom selection & implementation, RFP creation & execution and CRM consulting services.

Projects included:

Kazerouni Law Group, Costa Mesa, CA**January – February 2018**

Contracted to provide expert witness support involving ATDS (Dialer) analysis in support of TCPA casework. Work involves an expert report, data analysis. May include deposition, and trial testimony.

Todd M. Friedman Law Offices, Beverly Hills, CA**January 2018 – Present**

Contracted to provide expert witness support involving SMS texting (as ATDS (Dialer)) in a TCPA case. Work involves an expert report and may include data analysis, deposition, trial testimony.

Humatec, Overland Park, KS**August– October 2017**

Contracted to provide expert witness support involving ATDS (Dialer) and call recording telecommunications capabilities at a medical services collection agency. Work involves an expert report and deposition.

Donato, Minx, Brown & Pool, P.C., Houston, TX**April 2017 – Present**

Contracted to provide expert witness support involving PBX telecommunications capabilities at a hotel in a homicide trial. Work involves an expert report and may include deposition with trial testimony.

HSE Law, LLP, Rochester, NY**August 2015 – June 2016**

Contracted to provide expert witness support involving telecommunications, contact center technologies and technical program management. Project includes expert report development, deposition, real-time arbitration analysis support, and prep for testimony. My client was successful and awarded full judgement. Further details confidential.

Dignity Health – Mercy Medical Group, Sacramento, CA**March 2015 – June 2016**

Contracted to conduct analysis of Dignity Health MMG contact center technology infrastructure and develop roadmap for contact center technology operations. Responsibilities include conducting six remediation (intervention) programs related to existing telecom switches, and development and execution of an RFP selection process (with ensuing implementation).

FEMA (Federal Emergency Management Agency), Winchester, VA**May 2014 – September 2014**

Contracted to conduct analysis of FEMA enterprise voice platform, perform gap analysis against current and emerging requirements, conduct survey of current and emerging technologies, and develop 5-yr technology roadmap. Included plan to consolidate 33 legacy PBXs into centralized, DR-ready platform to deliver voice and UC capabilities to full enterprise of 10,000+ employees.

John C. Lincoln Health Network, Phoenix, AZ**March 2011 – October 2013**

Conducted assessment of troubled Nortel telecom upgrade; generated corrective action plans and suggestions regarding going forward platform strategy (in progress); Project Managed acquisition + implementation of Voice over WiFi Nurse-Call platform for hospital system. Project

managed Call Pilot server replacement project. Provided oversight for call center phone support for EMR rollout through hospital network (3 phases).

California Dept. of Managed Health Care Services, Sacramento, CA **April 2011 – September 2012**
Performed assessment of legacy call center platform, collected requirements and developed going-forward plan to replace system. Provided Project Management and Vendor management throughout 18-month project. Project included a network assessment and network security audit. Selection and implementation completed successfully on time and on budget.

Lipton, Weinberger & Husick, Exton, PA **January 2011 – Fall 2012**
Provided expert witness support in the form of 132 affidavits in three separate patent matters. Work involved review and analysis of prior art and argument supporting novelty of in-process patent applications.

FEMA (Federal Emergency Management Agency), Denton, TX **February 2011 – July 2011**
Subcontracted through BAE Systems to conduct analysis of FEMA call center platform, perform gap analysis against current and emerging requirements, conduct survey of current and emerging technologies, and develop 5-yr technology roadmap. Roadmap delivered and accepted on time.

Vonage, Holmdel, NJ **December 2010 – February 2011**
Subcontracted through EMC to conduct an assessment of IT operations supporting the customer care organization. As the Contact Center Technology SME, assessed infrastructure and tools used to enable the operation. Consulted in assessment of processes supporting Care and various factors across the company impacting IT/Care alignment and efficiency.

Verizon Business/State of CA EDD, Sacramento, CA **June 2010 – Oct 2010**
Provided interim project management for Verizon in oversight of a network-based IVR implementation as a feature of the State of California CalNet II network services contract. The team consisted of Verizon technical personnel and State employees (customer service and IT).

Metro Health Network, Cleveland, OH **April 2010 – May 2010**
Provided guidance to troubled Nortel telecom upgrade project in the form of project review, personnel review and VAR assessment.

NV Energy, Las Vegas, NV **April 2010 – May 2010**
Conducted assessment of NV Energy call center operations regarding replacement of telephony instruments in an Aspect-based customer service operation. Completed project on time and budget.

Covington & Burling LLP, Silicon Valley, CA **August 2009 – Dec 2009**
Acted as expert witness for the plaintiff (Katz), producing Expert Reports and analysis pertinent to call center technology applications including TDM and VoIP platforms in largest U.S. telecom patent litigation case ever prosecuted. In-depth vendor analysis included Avaya, Aspect, Nortel and Rockwell telephony suites covering PBX, ACD, IVR, CTI, voice mail and related technologies.

CA State Department of Motor Vehicles, Sacramento, CA **March 2009 – July 2009**
Performed technology assessment at California DMV for its statewide telecommunications platform serving 8000+ persons. Analysis included call center functions performed in *ad hoc* call handling operations spread across DMV in various divisions. Project included “As Is” documentation of incumbent systems and userbase, “To Be” model for proposed replacement

platform, and “Gap Analysis / Implementation Plan” to migrate enterprise to target operating model.

Heller Ehrman LLP, San Francisco, CA Case: 2:07-ml-01816-RGK-FFM **March 2008 – Dec 2008**
Acted as expert witness for the plaintiff (Katz), producing Expert Reports and analysis pertinent to call center technology applications including TDM and VoIP platforms in largest U.S. telecom patent litigation case ever prosecuted. In-depth vendor analysis included Avaya, Aspect, Nortel and Rockwell telephony suites covering PBX, ACD, IVR, CTI, voice mail and related technologies.

BP Fuels/BP Elite Call Center, Chicago, IL **May 2007 - September 2007**
Analyzed functional and technical requirements to realize new call center function supporting Fuels demand forecasting. Managed design and implementation of function in call center. Managed System Test for Fuels development efforts involving data warehouse, Manugistics forecasting, Vitria and Portal components of new offering.

BP Elite Call Center, Chicago, IL **March 2007 - April 2007**
Provided consultation regarding CISCO Call Manager platform versus Interactive Intelligence (incumbent) focused upon cost of ownership, integration, management and expansion of the existing platform using VOIP.

LifeMasters Inc., South San Francisco, CA **October 2006-February 2007**
Project Manager *Predictive Dialer Course Remediation* project, and *NICE Quality Monitoring Implementation Intervention* project. PDS project required management consulting, productivity analysis, budget estimates and PDS program development. NICE project required vendor management, platform analysis and detailed project management to ensure vendor conformance to deliverables. Involved integration with Avaya S8700 VoIP enterprise voice platform.

BP HR Retail Employee Service Center, Los Angeles, CA **October 2005 - May 2006**
Managed implementation of call center for BP HR employing Aspect ACD (automatic call distributor) and Siebel on Demand for approximately 30 agents (on time, on budget).

BP CSC Call Center: Chicago, IL **September 2005 - September 2006**
Develop a Business Continuity Plan and Disaster Recovery Plan for Call Center of ~200 agents. Project involved performing business impact analysis, risk assessment and development of a recovery profile for services performed by the center.

LifeMasters Inc., South San Francisco, CA **August 2005-April 2006**
Project Manager coordinating selection and green-field construction of call center in supported self-care/healthcare industry, location: Indianapolis (on time, on budget), including implementation of S8700 VoIP voice platform.

BP USCO eMaintenance, Chicago, IL /Tulsa, OK **September 2005 - October 2005**
Provided telephony and technical management in support of facility maintenance IVR application comprised of two IVRs located in Tulsa, OK and Naperville, IL respectively. Developed high-availability architecture for 24x7 service. Required vendor management (BlackBox and Urgent Technologies, Inc.) and premise telephony switching expertise.

BP CSC Call Center, Chicago, IL /Los Angeles, CA / Des Moines, IA **December 2003 - July 2005**
Technical architect and project manager. Executed RFP selection of analog/VoIP switching platform supporting a multimedia call center and administrative staff of approximately 200. Implemented first

unified messaging and VoIP-capable system for BP worldwide. Included inter-site call center networking with Des Moines, IA (Avaya) and La Palma, CA (Aspect) call centers. Platform bundled IVR/ACD/PBX/ ERMS and Quality Recorder components to deliver integrated capability under budget and on time.

Considerations included application flexibility (for dynamic call center environment), and manageability by limited local staff. Managed carrier T1 and PRI facilities procurement and deployment, including CSU/DSU and Channel Bank deployments. Managed Blue Pumpkin WFM procurement and installation.

LifeMasters Inc., South San Francisco, CA

December 2004-May 2005

Project Manager coordinating construction and build-out of Avaya S8700 VoIP-based Call Center in self-care/healthcare industry located in San Antonio, Texas. Tasks include overall project management covering construction, telephony, cabling infrastructure, information technology and furniture. Re-engaged to cover subsequent call center build (3Q05).

BP Call Center: Witness QA Platform Migration Study, LA, CA / Des Moines, IA **October 2003**

Technical architect assessing migration plan and integration effort for a Witness QA server in conjunction with an Aspect ACD, Aspect WinSets, Avaya G3si, and distributed agents in Des Moines, IA, and Chicago, IL.

Santa Clara Water District Wireless RFP Development, Santa Clara CA

July-September 2003

Telecommunications analyst and strategist responsible for assessment of Wireless Services and creation of RFP selection process. Authored RFP document, created process and developed spreadsheet analysis tools for grading sessions.

BP Help Desk Outsourcing RFP, Los Angeles, CA / Des Moines, IA

May-June 2003

Consolidated RFP input and authored substantial sections of RFP process document focused upon outsourcing Help Desk operations to firms located in India. Document included detailed business & technical requirements, RFP process creation and vendor management components.

BP Call Center Help Desk Consolidation, Los Angeles, CA / Des Moines, IA

April-May 2003

Technical architect in charge of analysis and cost assessment associated with technology aspects of Call Center consolidation across domestic US Call center operation for British Petroleum. LA Campus based upon Rolm 9751 switch (PBX). Project delivered on time and under budget, receiving accolades across client organization for value-driven analysis. Additional CRM Tool analysis project is pending approval.

Santa Clara Water District Wireless Strategy Development, Santa Clara CA **February-May 2003**

Telecommunications analyst and strategist responsible for assessment of Wireless Services across government agency and development of managed services architecture. Focus included wireless services across Cellular, PCS, paging, GPS, Wi-Fi 802.11a,b,g, and Bluetooth. Delivered project early and under budget.

Mobile Access Gateway Communications

January - June 2002

Chief Technical Officer

Accountable for strategic technology direction for a wireless telematics company. Established platform architecture, recruited senior technical staff and managed development of initial product platform. Authored platform patent applications. Delivered prototype system on time and under budget by 30%.

IpVerse, Inc., San Jose, CA

June-July 2001

Telecommunications analyst and technical architect responsible for performing technical due diligence of a VoIP gear vendor on behalf of a San Francisco Venture Capital firm. Firm invested at my recommendation.

Vertical Networks, Inc., Sunnyvale, CA**May 2000**

Telecommunications analyst and technical architect responsible for performing technical due diligence of a converged communications & VoIP gear vendor on behalf of a San Francisco Venture Capital firm. Firm invested at my recommendation.

Telio Innovations, San Francisco, CA**May - November 1998***Chief Technical Officer*

Responsible for web-telephony platform architecture and management of product development team. Led development of a telephony platform/service providing telephone access to personalized web content. Developed project plans and managed team of developers in web and telephone product areas.

eFusion, Inc., Sunnyvale, CA**April-May 1998**

Telecommunications analyst and technical architect responsible for performing technical due diligence of a VoIP gear vendor on behalf of a San Francisco Venture Capital firm. Firm postponed investment in property at my recommendation.

eLOYALTY CORPORATION, Chicago, IL**January 1999 - August 2002**

Senior Principal in a global, billion \$\$ Management Consulting and Customer Relationship Management company.

Projects included:

eLoyalty Knowledge Management Program Director, El Dorado Hills, CA March - September 2001

Created enterprise knowledge management program and system, directing its design and construction. Instituted intellectual property policy. Managed 100+ consultants distributed globally

- Identified and solved critical multi-\$\$M loss of enterprise intellectual capital in core competency
- Drove enterprise knowledge collection and Portal Design supporting \$200M business
- Restructured corporate information sharing capability around Knowledge Management system

PeopleSoft Customer1 Project, Tech Architect/Manager, Pleasanton, CA August 2000 - March 2001

Drove Technical Architecture and Project Management on PeopleSoft's \$5.2 M first implementation of PeopleSoft8 CRM serving a global user-base of 2500 and the entire PeopleSoft customer base.

- Direct accountability to PeopleSoft CIO
- Restructured Optimization Project successfully improving performance by 25%
- Executed full architectural assessment, Fit-Gap analysis, and user-base analysis
- Conducted technical due-diligence upon the Interactive Intelligence call center platform.
- Managed Genesys CTI platform enhancements including call routing changes etc.
- Marshaled 50+ technical and resources across PeopleSoft to consolidate 4 global Vantive applications

Agilent Technologies, Infrastructure Delivery Manager, Roseville, CA January - May 2000

Managed infrastructure organization and strategic direction for a \$55M systems divestiture project involving the spinout of Agilent from Hewlett-Packard.

- Strategic assessment of mission-critical applications
- Drove WAN network infrastructure assessment and recommendations for global project to ensure performance of Vantive CRM in a distributed environment.
- Strategically directed Agilent's selection of an enterprise middleware standard

BP/ARCO, Project Manager & Technical Architect, Los Angeles, CA January - December 1999

Directed ARCO \$5M R3 Initiative to improve customer service in their national Mini-Mart operation, providing project management for consolidating 40+ call centers into 1, reporting to the SVP of operations.

- Managed team of 20 contractors and 55 ARCO employees responsible for process engineering, technical design and implementation of an Aspect Call Center and Prospect CTI system; involved with inter-working to Rolm 9751 PBX
- Call center supported 1700+ retail outlets with a multi-tiered service model in La Palma, CA
- Drove HR policy change in ARCO compensation plan saving ARCO \$900K/year
- Saved ARCO more than \$2M each year in operations costs, improved mini-mart revenue through uptime enhancement, and dramatically improved service levels
- Selected and managed implementation of Witness QA platform for consolidated call center in La Palma
- Successfully delivered project on time and within budget

AT&T LABORATORIES, Naperville, IL**January 1994 - May 1998****AT&T Bell Labs Telephony Strategist for Intel Corporation, Folsom, CA**

Drove Intel's Enterprise Telephony Strategy for 4 years within the Network Transport organization developing enterprise vision for all premises telephony equipment and network services, aiding in RFP procurement cycles.

- Established enterprise standards for telephony products and network services across Intel
 - Influenced enterprise procurement policy in \$50M annual telephony/network expenses
 - Crafted Intel strategy across all telephony technologies for 80,000-member enterprise
 - Resident Telephony Expert, representing Intel with 15+ telecom vendors
 - Created Labs/Intel Technical Architecture Forum between senior Intel IT architects, Bell Labs and AT&T Labs product/service development
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| – IVR RFP Process Tech. Architect (\$2M year) | – IP Voice Strategist (\$1M year) |
| – CTI Strategy & RFP Process Tech. Architect | – PSTN Services (800, SDN) Strategist (\$25M year) |
| – Unified Messaging program director (\$4M year) | – Voice Security (Encryption) team member |
| – Audio Bridging RFP Process Tech. Architect | – PBX Strategist (\$2M year) |
| – Wireless (Cell & Paging) Strategist (\$10M year) | – VPN assessment facilitator with AT&T |

AT&T BELL LABORATORIES, Warren, NJ**June 1992 - December 1993****Database Architect and Application Designer**

- Sybase database architect and developer in Bell Labs *QUEST* consulting organization.
- Authored applications and provided project management/requirements analysis for clients

AT&T - GENERAL BUSINESS SYSTEMS, Somerset, NJ**June 1989 - May 1992****LAN and PC Technology Manager**

- Specified, procured, installed and managed first district LAN for group of approximately 40 people.

INTELLICON CONSULTING CO., San Antonio, TX**October 1987 - May 1989****EDUCATION/MEMBERSHIPS**

Stevens Institute of Technology, Hoboken, NJ
M.S., Computer Science, 1994

Interactive Intelligence, Indianapolis, IN
Certification Course, August 2004

Yale University, New Haven, CT
B.A., English, 1986

Project Management Institute (PMI) (former)

Butler High School, Butler, PA
Valedictorian, 1982, class of 868

American Society of Quality (ASQ) (former)

PUBLICATIONS & PATENTS

- "Audio Message Driven Customer Interaction Queuing System" **U.S. Patent 8,825,787** issued 2 September 2014
- "User Driven Voice Interaction" **U.S. Patent 8,693,377** issued 8 April 2014
- "Audio Message Driven Customer Interaction Queuing System" **U.S. Patent 8,468,210** issued 18 June 2013
- "Audio Message Driven Customer Interaction Queuing System" **U.S. Patent 7,895,283** issued 22 February 2011
- "*Why CRM Projects Fail*", CRM Associates, 2003
- "*Should We Care About IP Telephony?*" Voice & Data, January 1998
- Reviewer of Harry Green's, "*Handbook of Telecommunications II*," 1995
- "*The Fingerprinted Database*" IEEE Sixth International Conference on Software Engineering, 1990