

# DOUG JAMES TAYLOR

Paralegal and Experienced Business Professional

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Writing portfolio, awards, recognition and more  www.dougjtaylor.com

## KEY ACCOMPLISHMENTS

- Employee of the Month Award for demonstrating outstanding initiative - July 2019.
- Led and coordinated a diverse internal team to reconcile 16 retroactive disciplinary matters; within 2 weeks, all matters were brought to 100% compliance with order satisfaction.
- Administered all aspects of preparing, reviewing, tracking, approving and distributing reasons and orders to achieve 100% completion of 12 outstanding pending matters.
- Created and synthesized a legal cost tracking system for the annual budget that produced more timely and accurate historical data and exposed additional opportunities to reduce legal spend.
- Demonstrated ability to deliver value and exceed client expectations with over \$4.5 million Assets Under Management including acquiring \$3 million in new assets over one year and two-time Top Ten Canadian Advisor.
- Expertise in ZOOM and Microsoft Office Suite, Adobe Acrobat and legal research with Quicklaw, Westlaw, and CanLii; strong database and CRM skills in AS400, SharePoint, Salesforce, xRM and SAP.

## RELEVANT EXPERIENCE

### **Self Employed**

2020 - Current

- Conduct legal research, Draft and File claims overflow services for colleagues.
- Freelance legal ghostwriting and editing.
- Provide Legal Business Consulting Services focused on increasing utilization and realization rates through process efficiency design and automation.

### **Litigation Paralegal**

2020

Total Credit Recovery Limited, Toronto

- Reporting to General Counsel, managed workflow and assume carriage of the enterprise Small Claims portfolio of approximately 280 accounts; developed standardized workflow strategies including portfolio analytics using pivot tables, current balance/interest, pre and post judgement interest calculation, and debtor financial capacity assessment templates.
- Employ risk management, customer relations, alternative dispute resolution, negotiations and financial and accounting practices to initiate payment plans and repayment schedules according to the debtor's financial situation and client SLA directives; over \$15,000 in recoveries.
- Commence legal action and enforcement when necessary, 37 Legal demand letters sent, 92 claims issued, 31 requests for default judgment and five judgments awarded.
- Provide legal administrative support to General Counsel on Superior Court actions.

### **Workers Compensation Coordinator, Paralegal (Contract)**

2019

Morneau Shepell, Occupational Claim Prevention and Management, Toronto

- Managed the second-largest portfolio; all western province claims (MB to BC and ON), to meet 95% of SLA targets and ensure 100% compliance with WCB regulatory deadlines.
- Conducted early intervention case assessments for numerous multi-national clients and federally regulated corporations; gathered and understand the mechanics and medical context of the occupational injury to identify risks and recommend the next course of action.
- Critically analyzed and identified objectionable/contestable claims management issues by applying relevant Provincial WCB policies to mitigate lost time and accelerated return to work times with a focus on reducing client Experimental Experience Rating costs (NEER).

- Generated documentation for clients related to absence management of their employees, reporting of client experience; weekly, monthly or quarterly as determined by client-specific SLAs.
- Provided support with administrative functions such as customer service, education, technical/systems issues, data entry, communication distribution, create, assemble, and/or maintain internal reports and statistics, creation, review, and/or revision of client reports, return to work plans and process documents; coordinate the flow of information to the WCB and Case Managers.

**Legal Coordinator (Contract)**

2018

Chartered Professional Accountants Ontario (CPA Ontario), Office of the General Counsel, Toronto

- Accountable for the Reviewer of Complaints tribunal lifecycle by communicating with external complainants and internal business managers to minimize exposure to reputational risk; achieved 100% tribunal directives and ensured 100% regulatory compliance.
- Re-engineered existing account payables and receivables administration by instituting new standardized processes for monthly accrual and variance analysis; reduced reporting time by 50% and overall accruals by 75%.
- Contributed to the semi-annual budgeting process for the Office of the General Counsel (OGC) by creating and integrating a legal cost tracking system that presented additional opportunities to reduce legal spend.
- Increased recoveries by 25% by designing and facilitating enforcement process improvements including advanced Excel tracking, and through drafting and serving of demand letters and affidavits to obtain and file endorsements and writs with the Superior Court of Justice.
- Synthesized and analyzed hearing logs and KPIs to produce more accurate and timely historical benchmark data for measuring tribunal hearings efficiency, regulatory compliance, and tribunal timeline directives.
- Collaborated in researching and creating the annual Public Accountants Council (PAC) and annual Office of the Fairness Commissioner (OFC) reports to satisfying all regulatory compliance mandates.
- Responsible for ensuring 100% compliance and resolving all order satisfaction conditions in tribunal disciplinary matters, including public and regulatory notifications of suspensions, revocations, remedial professional development, practice restrictions, fines and fees; led and coordinated a diverse internal team to successfully reconcile 16 retroactive disciplinary matters over two years; resulting in 100% compliance with order satisfaction in all matters within 2 weeks.
- Developed a standard operating procedure manual to increase efficiency, resulting in 100% completion of 12 outstanding pending reasons.

**EDUCATION AND PROFESSIONAL DEVELOPMENT**

Bachelor's degree with Distinction, Paralegal Studies, *Guelph University-Humber College* 2016  
WME, LLQP, CIC, CPH, CSC Certificates, *Canadian Securities Institute (CSI)* 2007 – 2009  
Legal Studies Certificate, *Humber College* 2003

**LICENSES AND CERTIFICATIONS**

Notary Public, *Ontario Ministry of the Attorney General* 2020  
Commissioner of Oaths, *Ontario Ministry of the Attorney General* 2016  
Class P1 License (Paralegal), *The Law Society of Upper Canada (Law Society of Ontario)* 2016