



Robert Klein

Company: Action iT (Pty) Ltd

Position: CEO, Director and Shareholder

Email: robert@actionit4u.com

Professional qualifications & membership:

- CA(SA)
- B.Rek (Hons) – University of Stellenbosch.
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- Passed RE 1 and RE 5 Exams.
- Member SAICA (South African Institute of Chartered Accountants).
- Chartered Government Finance Officer - CIGFARO (Chartered Institute of Government Finance, Audit & Risk Officers).
- Director, Chair of Board: ICLEI - Local Governments for Sustainability - Africa Secretariat.
- Completed articles at Deloitte.
- Member IRMSA (The Institute of Risk Management South Africa)

Professional background:

- Robert is the CEO of Action iT (Pty) Ltd and has more than 28 years consulting experience in business transformation. He has accumulated extensive knowledge and experience in managing professional services firms and has a wide array of functional, technical and management experience and has led projects in Business Architecture, Systems Design and Implementation, Strategy, Business Planning and Budgeting, Performance Management, Transformation and Change Management in both the Private and Public Sectors.
- Robert has facilitated many workshops and learning initiatives to all levels of staff in the Public and Private sectors;
- He has gained extensive practical experience in business strategy and improvement, business planning, budgeting, forecasting, system integration, design and implementation, transformation, change management and operational management.
- He has extensive practical experience in organisational and individual performance management, incentive scheme design, mentoring, coaching and capacity building of people and teams.
- Robert is the founder, shareholder and CEO of Action iT (Pty) Ltd, a private South African company that that focus on Performance Management and owns and develops Action Assist. Action Assist is an innovative online subscription offering which provides organisations with a secure encrypted web-based platform for the management of operational processes and data storage on the internet. The tool reduces the administration burden on stakeholders in the day to day operational running of the organisation and clearly assigns responsibility and accountability to all users. Action Assist includes modules for the management of performance, monitoring and evaluation of compliance, risks, queries, complaints and actions etc. There are currently in excess of 45 municipalities in the Republic of South Africa that subscribe to 1 or modules of Action Assist;

Subject matter expert:

- As Business Manager of Mallinicks Inc (now incorporated into Webber Wentzel), Robert managed the operational, non-legal operations and infrastructure of the law firm. Mallinicks Inc was a law firm established in 1969 in Cape Town. His responsibilities included the conversion of the practice management systems from a manual and “dos” environment to a fully integrated internationally benchmarked practice management solution. He was ultimately responsible for the Finance, Human Resource, Marketing, IT and Facilities functions of the firm. Robert designed, recruited and implemented the Human Resource and Marketing functions at the firm;

- Facilitated the design and implementation of financial / costing / accounting process for organisations. This included:
 - ✓ Being an integral part of the team setting-up the accounting function of the shared services billing within Old Mutual when Old mutual outsourced certain IT functions to CSC in 1999;
 - ✓ Setting up the accounting function of ICLEI Africa;
 - ✓ Redefining the accounting processes of Enablis SA;
- Managed the change process in the restructuring of the accounting function / operation on various assignments;
- Extensive experience in the preparation of business cases, business plans, budgets, costings, feasibility studies and forecasts for different organisation types in different industries in the Public and Private Sectors. These include:
 - ✓ Excel Costing Model for the costing of the Implementation Plan for the Small-Scale Fisheries Policy;
 - ✓ Excel Costing Model for the costing of the AIS Regulations Implementation Plan;
 - ✓ Financial model for the Business Case for the Eastern Cape Parks Board;
 - ✓ Excel Costing Model for the costing for the National Biodiversity Framework;
- Assisted with the establishment and implementation of a service offering to client's which links strategy to the requirements of the Employment Equity, Skills Development, and the Skills Levy Acts when employed at Deloitte Human Capital Corporation (2000 – 2002);
- Managed various audit and related assignments (mainly owner-managed business) while employed as an Audit Manager at Deloitte Cape Town (1995 – 1997). These included:
 - ✓ Nando's;
 - ✓ Mount Nelson Hotel;
- Supervised various audit and related assignments over a period of 4 years, three of which were spent at Deloitte in The Hague, The Netherlands. These included:
 - ✓ Transnet (Western Cape);
 - ✓ Old Mutual Unit Trusts;
- Acted as the Chairperson of a Multi-Cultural Development Program (MCDP) responsible for internal transformation, Employment Equity Act compliance and Diversity Workshops while employed as a manager at Deloitte Cape Town;
- Extensive practical experience in organisational and individual performance management, incentive scheme design, mentoring, coaching and capacity building of people and teams;
- Facilitated many workshops and learning initiatives to all levels of staff in the Public and Private sectors.
- Responsible for the business analysis, design and implementation of the Action iT (Pty) Ltd web-based tool called Action Assist (www.actionassist.co.za). The current modules included in this offering include:
 - ✓ IDP and SDBIP (Organisational Performance Management);
 - ✓ Individual Performance Management;
 - ✓ Resolutions Management;
 - ✓ Complaints Management;
 - ✓ Contract Management;
 - ✓ Action / Task Management;
 - ✓ Risk Management;
 - ✓ Query Management (Audit and other types of queries);
 - ✓ Project / Contract Management;
 - ✓ Compliance Management;
- Responsible for the financial management oversight role at a global environmental non-profit organisation (ICLEI);
- Developed and facilitated a financial training module for a Public Entity at the UCT Graduate School of Business;

Industry experience:

Robert is a consultant specialising in public and private sector operational performance / practice management and institutional capacity building and he has experience and expertise in the fields of:

- ✓ Organisational and Individual Performance Management
- ✓ Practice Management

- ✓ Programme and Project Management
- ✓ Systems Design, Implementation & Integration
- ✓ Financial Management
- ✓ Strategy Development
- ✓ Budgeting and Forecasting
- ✓ Business Case Development
- ✓ Business Planning
- ✓ Change Management
- ✓ Facilitation & Training
- ✓ Diversity Management
- ✓ People Management and Incentive Design
- ✓ Mentorship and Coaching

Publications:

- **Auditing of the Performance Management System.**
CIGFARO Magazine, Volume 19 Number 4 – Winter 2019 (Page 16)
- **Actioning Organisational and Individual Performance Management with your Municipality.**
IMFO Magazine, Volume 13 Number 1 - Spring 2012 (Page 31)
- **Embedding Urban Sustainability Considerations into IDP's and SDBIP's**
Written with Kobie Brand - (Executive Director – Local Government for Sustainability – Africa) -IMFO Magazine, Volume 12, Volume 12 Number 4 - Winter 2012 (Page 20)
- **Maximising the Return on Investment from attending the IMFO Conference**
IMFO Magazine, Volume 12, Number 2 - Summer 2011 (Page 6)

Recent addresses & presentations:

- Robert was part of a South African Local Government Association (SALGA) panel at the 2020 Annual Local Government Performance Management Seminar in February 2020;
- Robert was part of a South African Local Government Association (SALGA) panel at the 2019 Annual Local Government Performance Management Seminar in March 2019;
- Robert presented a paper on the auditing of performance management systems at the annual CIGFARO Audit and Risk Indaba in East London in April 2019;
- Robert, together with PwC, facilitates and two-day seminar on performance management to municipalities at the CIGFARO offices in Johannesburg in June 2018.
- Presentation to the AGSA Senior Managers Conference on Improving Service Delivery with the effective use of Action Assist at the Elangeni hotel in Durban on 22 April 2013.