



BETH HALE

SENIOR EPM CONSULTANT

Beth Hale has 25+ years of business success in EPM development, consulting, engagement management, and technical training for EPM/BI applications, consolidations and reporting, and financial reporting and analysis tools.

As a past Hyperion Software employee, Beth built her skills in Hyperion Enterprise and Hyperion Essbase before moving on to Business Objects, Micro Strategy, HFM, FDM, and currently Tagetik. Beth also has vast experience developing custom training manuals, web training and on-site “hands-on” training courses, tailored to Admin and End-Users.

AREA OF EXPERTISE

- Fluence Technologies
- CCH Tagetik version 5.3
- Hyperion Financial Management version 11.1.2.3.500
- Financial Data Quality Management (FDM) version 11.1.2.3.500
- Hyperion
- MicroStrategy 9.4.1

EDUCATION

Pepperdine University
Masters of Business Admin.

University of California, Los Angeles
Bachelor of Science in Mathematics and Applied Science

Micro Strategy Certified Engineer

- Lead consulting role on six Tagetik Consolidations implementations. Heavily involved in application design & development, metadata maintenance, report writing & customized training.
- Efficiently managed EPM Team through five version upgrades, and applied version migrations smoothly on six different environments by successfully balancing competing resources and testing constraints, creating detailed task and communication plans, and ensuring minimal impact to users.
- Defined internal business client requirements and scope of multiple projects, updated systems processes to map data from various upstream sources, and developed Business Intelligence tool projects.
- Led numerous F1000 corporations through installation, design, customization and successful implementations of Hyperion.
- Created custom training courseware and delivered technical training to Hyperion (Enterprise, Essbase and HFM), Micro Strategy, Business Objects and Tagetik administrators and end users.

CONTACT INFORMATION

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PROFESSIONAL WORK EXPERIENCE

Skehana Systems

November 2014

to present

Senior Consultant

- Provides Tagetik and EPM design and implementation expertise including Tagetik 5.3, Hyperion Financial Management (HFM) 11.2.x, Financial Data Quality Management (FDM), Hyperion Enterprise, and Hyperion Reporting modules to our clients and partners.
- Created and delivered custom training, documentation and web-based recorded training for clients using Tagetik, HFM, and FDM.
- A key contributor to the optimization and training team that took an existing malfunctioning HFM application and upgraded, optimized and trained the administrators and end users in its most efficient use. The project included the review and recommendation for improvements in the existing application, the creation of administrator and end-user training manuals, and subsequent training of the administrators, end users and the Assistant Controller (Sponsor).

Bank of America, Concord, CA

2000 – 2014

VP-Engagement Manager/Design Consultant

- Provided management support of eleven BI projects in the MicroStrategy product suite (Desktop, Architect, Web, Mobile, Object Manager, Integrity Manager, Office, Command Manager, and System Manager), including user maintenance, the configuration of security roles and privilege assignments, environment monitoring and second level support for Customer Service team.
- Efficiently managed Business Intelligence Team through five MicroStrategy software version upgrades, ranging from 8.1.1 to 9.4.1, and applied version migrations smoothly on six different environments by successfully balancing competing resources and testing constraints, creating detailed task and communication plans, and ensuring minimal impact to users.
- Received nine recognition rewards for outstanding achievements, teamwork, project management and organizational skills.

Ajilon Consulting, San Ramon, CA

2008

Senior Analyst Consultant

- Defined internal business client requirements and scope of the project, updated systems processes to map data from various upstream sources, database design support, and developed a new Business Intelligence tool project.

Innovative Dynamic, Walnut Creek, CA

1998 – 2005

Business Intelligence Consultant & Trainer

- Developed and implemented automated financial reporting systems at Charles Schwab using Hyperion Essbase through web delivery.
- Delivered technical training to clients on Business Objects query, reporting and analysis tools as a Certified Business Objects Partner (98-00).

Base Consulting Group, LLC, Oakland, CA

1997 – 1998

Training Manager

- Managed all aspects of the BASE Training Center and increased student enrollment by 100%.
- Established a new Data Warehousing Professional Certificate Program using Business Objects, Smart DB Workbench and Hyperion Essbase through UC Berkeley Extension Program.
- Created course development standards and supervised a team of developers on curriculum and custom training for clients.
- Mentored new instructors and designed instructor companion kits to aid instructors in training techniques and new updates to the courses and software.

PROFESSIONAL WORK EXPERIENCE

Hyperion Software, San Francisco, CA **Training Project Manager**

1991 – 1997

- Trained Fortune 1000 clients on five core Hyperion Software products and six add-on products while maintaining a client evaluation average of 4.9 out of 5.
- Developed courseware for new courses including training manuals, workshops and slides.
- Mentored new instructors and designed instructor companion kits to aid instructors on training techniques and new updates to the courses and software.

Senior Consultant

- Consulted Fortune 1000 Corporations on the installation, design, customization and implementation of worldwide-sophisticated financial reporting systems to automate reporting and reduce closing cycles. Industries included: retail, banking, insurance, medical, food and beverage, education and entertainment.
- Played the lead consulting role in the development and implementation of Levi Strauss' international financial reporting system.