

CASEY KNOLLMEYER

SENIOR PLANNING CONSULTANT



AREA OF EXPERTISE

- Workday Adaptive
- EPM application implementation
- Workiva WDesk implementations
- Various D365 reporting requirement updates
- DRM hierarchy design and implementation
- Oracle OBIEE design, build and administration
- SAP ledger implementation

EDUCATION

- University of North Carolina at Charlotte – B.S. Accounting
- University of North Carolina at Charlotte – B.S. International Business
- Certified ScrumMaster (CSM) – Agile framework

CONTACT INFORMATION

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Casey Knollmeyer is an experienced senior planning consultant with over eight years of experience collaborating with Fortune 100 companies to deploy diverse Enterprise Performance Management (EPM) software solutions.

Her multifaceted roles across numerous software implementations encompass project management, design requirement documentation, user acceptance testing, and end-user training, particularly in consolidation and planning domains.

As the lead project manager and administrator for two Hyperion Financial Management (HFM) applications, Casey adeptly oversaw the onboarding of over 50 end users across various subsidiaries.

Her extensive background in general ledger accounting uniquely positions her to seamlessly bridge the gap between technical teams and business stakeholders. With a keen eye for aligning project requirements with enterprise-wide objectives, Casey ensures streamlined operations while upholding project integrity and organization. She brings to the table a rare blend of project management expertise, business acumen, and system architecture comprehension, making her an invaluable asset to any team.



PROFESSIONAL WORK EXPERIENCE

Skehana Systems, LLC

2022 to present

EPM consultant work in a variety of projects for our clients

Owner and Lead Consultant, Charlotte NC - 2019 to present

KRG Consulting

- Proficient in Workday Adaptive implementation, with extensive experience in project management of development teams, ensuring successful project delivery within specified timelines and budget constraints.
- Demonstrated ability to effectively communicate and collaborate with third-party consultants, serving as a client advocate to ensure project goals are aligned and achieved to the highest standards.
- Skilled in facilitating the scheduling of meetings and maintaining comprehensive meeting notes, fostering transparent communication and ensuring all stakeholders are well-informed throughout the project lifecycle.
- Experienced in assisting with report builds and conducting thorough data validation, contributing to the accuracy and reliability of data-driven insights for informed decision-making.
- Design, testing and documentation for global consolidation functions, metadata and hierarchies, and foreign exchange related activity in HFM/FCCS
- Analysis and build of reporting within D365 and HFM platforms including Excel based reporting via Smartview
- Design and system requirement documentation for FDMEE data load processes for various HFM applications
- Design and system requirement documentation for Oracle security set up for global consolidations systems
- Ad hoc data analysis for system data validation, reconciliation and trouble shooting
- Design-build reporting consulting services in various Oracle platforms (OBIEE, HFM, DRM), Microsoft D365 and Workiva Wdesk
- End user process documentation consulting services for various accounting and reporting systems and SOX requirements
- Ad hoc month end/quarter end coverage of accounting and reporting across multiple department functions
- Process improvement liaison including design, rebuild and end user training of various system and reporting processes
- Project management of various client initiatives including system upgrades and continuous improvement initiatives
- Accounting and human resources consulting services for start up businesses

HFM System Administrator and Senior Financial Analyst, Charlotte NC 2017-2019

Nuveen/TIAA

- Manage Hyperion Financial Management (Oracle HFM) administrative duties
- Assist with design and implementation of HFM for three applications
- Train all end users of HFM applications and continue ongoing assistance through deliverable deadlines
- Maintain all SOPs and desktop procedures for HFM end user and administrator functions
- Lead enhancements to HFM applications including redesign of security matrix, additional reporting requirements, changes to metadata, and additional source data implementation
- Review, approve and document metadata changes related to consolidation application
- Function as additional staff coverage for DRM metadata changes, subsidiary accounting, and consolidation workflows
- Design, build and implement Workiva for 10K/10Q and audited financials regulatory reporting for major consolidated subsidiary
- Manage project-based work with consultants and IT resources functioning as the Project Manager and business SME
- Research and recommend future state enterprise-wide implementations and enhancements to streamline consolidation reporting

PROFESSIONAL WORK EXPERIENCE

Senior Regulatory Reporting Analyst, Charlotte, NC 2015-2017

TIAA

- Prepare various reporting for internal and external deliverables related to statutory insurance industry reporting
- Act as administrator for Workiva including onboarding of new users, training, trouble shooting and ad hoc requests
- Lead process improvement initiatives with business partners using Workiva and OBIEE
- Project manager for implementation of new Workiva functionality across all deliverables including data collections, certifications, and tasks
- Build and manage reports and dashboards in Oracle OBIEE and reconcile any reporting errors
- Drive process improvements to reduce manual data entry, expedite deliverable deadlines, and reduce data error

Education

University of North Carolina at Charlotte

Bachelor of Science - Accounting May 2008 Bachelor of Science - International Business December 2006

Software

Peoplesoft, Oracle DRM, SQL Developer, Workiva, Blackline, Oracle BIEE, BI Analytics, Oracle Hyperion Financial Management, FCCS, Essbase, Oracle Hyperion Smartview, SAP, Microsoft Dynamics, Mainframe, Enterprise Servicing, Microstrategy, CorpTax, Excel (advanced), Powerpoint, Access, Salesforce, Tableau, Visio, Power Query

Certifications

Certified ScrumMaster (CSM) - Agile framework