

Consulting Executive with in-depth experience in business capture and delivering complete life-cycle solutions in the Accounting/Financial fields. Expertise in the following financial reporting systems, including requirements analysis, design, development, deployment, training, and ongoing maintenance. Additional experience includes sales, pre-sales, program management, project management, resource management, service desk, training development, and accounting/finance solutions delivery. Consulting experience in the following businesses: Commercial, Government, automotive sales, sporting and retail management, manufacturing, aerospace, utility, and healthcare organizations.

PROFESSIONAL EXPERIENCE

SOAPSTONE CONSULTING LLC

JUN 2016- PRESENT

Managing Director

Build, design, implement, and test HFM solutions for numerous clients. Provide program and project management support and expertise in Oracle EPM and Oracle Cloud EPM. Clients' industries are currently involved in Manufacturing, Sales, Hospitality, and Medical. Address reporting needs using Workiva, WData, and CXO reporting along with the Oracle and SAP GL and EPM stack.

- Designed and streamlined client consolidations applications across various platforms, mainly focusing on the Oracle suite of EPM products
- Provided subject matter expertise to new various companies partnering with Oracle and their EPM cloud solutions (FCCS, EPBC, EPCM, etc)
- Provide Functional and subject matter expertise in support to various consulting assets and companies addressing consolidation and EPM solutions with Oracle Fusion and EPM products (HFM, Planning, Essbase)
- Design and convert manual reporting processes to Workiva and CXO solutions.

CAPGEMINI NORTH AMERICA

JUNE 2017- APRIL 2021

SENIOR MANAGER/ MANAGING DELIVERY ARCHITECT— ORACLE ANALYTICS PRACTICE

Provide practice leadership for the Oracle Analytics Practice, focusing on Consolidation, Planning, and BI reporting. Responsibilities highlights include

- Managing the North American practice with 40+ consultants located in North America and Asia with a client order book of \$30m in service and delivery revenue.
- Lead Architect for HFM and Oracle EPM Cloud solutions focusing on FCCS, EBPCS, ARCS, and EPRCS
- Project Manager for \$2.5M BiG Coke Consolidation and Planning Oracle EPM Cloud delivery
- Created materials for multiple Proof of Concept sales campaigns, highlighting team capabilities and core strengths
- Contributed and delivered Capgemini's Oracle EPM Cloud delivery strategy. Bringing delivery personnel inhouse instead of dependency on 3rd party consultants changed how CapGemini NA performed Hyperion delivery

ROBOHOLDINGS LLC, MCLEAN, VA (PART TIME)

JUN 2016- DEC 2017

Senior Manager - Consolidations

Provided program and project management support and expertise in Oracle EPM and Oracle Cloud EPM for clients where industries included State, Federal, and Local Government. I was responsible for providing teaming and partnering opportunities with other consulting firms involved in EPM solutions; highlights include:

- Subject Matter Expertise (SME) to potential clients partnering with Oracle on their EPM cloud solutions for Federal, State, and Local Governments
- Provided mentoring activities for consultants delivering Consolidation and EPM solutions with Oracle Fusion and EPM products.

2016- DEC 2018

Lead HFM Architect

Led the requirements, architecture, design, implementation and testing of HFM solutions for clients. Have provided program and project management support and expertise in Oracle EPM and Oracle Cloud EPM. Client's industries included Manufacturing, Sales, and medical organizations. Responsible for providing teaming and partnering with other consulting companies involved in EPM solutions; highlights include

- Designed and streamlined client consolidations applications
- Provided SME to potential clients and other partners for Oracle and their EPM cloud solutions
- Provided mentoring activities to US-Analytics consultants and, Partners consultants responsible for Consolidation and EPM solutions for Oracle Fusion and EPM products

HACKETT GROUP, MIAMI, FL

MAR 2012 – JUN 2016

Manager –EPM

Primary responsibility was to lead the entire life-cycle for the Hyperion Financial Management (HFM) design solutions. These engagements were performed as part of the Hackett Financial Consolidation Cloud Services (FCCS) team. HFM solutions included developing requirements, designing, building, deploying, and maintaining the solution provided.

- Participated and developed material for Hackett Roadshows across the US, which highlighted best practices and new technologies developed within the Oracle EPM offering and the Product Roadmap
- I booked an additional 1.5 Million in consulting revenue from a \$ 4 Billion car dealership establishing which was deploying a new consolidation solution.
- Developed a company-wide best practice methodology for delivery. Designed, prepared, and delivered custom training programs for Hyperion Financial Management customers. Interfaced with functional team and potential clients to address system or solution issues. Assisted in preparing Statements of Work for proposals for commercial and public sector markets.

EMERGING SOLUTIONS, CHICAGO, IL

MAY 2010 - MAR2012

Program Manager

Led engagements of the full life cycle for the Hyperion Financial Management solutions provided by the company. This work included developing requirements, design, test, deployment, and maintenance of provided solutions.

- Designed, developed, and delivered custom training programs for Hyperion Financial Management customers. Interfaced with current and potential clients to address system or solution issues.
- Prepared Statements of Work for proposals for commercial and public sector markets. Supported sales and marketing campaigns, which identified new revenue streams.

ORACLE CORP, RESTON, VA

NOV 2007- MAY 2010

Senior Principal Consultant

Led the Business Intelligence and Analytical Reporting practice. Designed sales and marketing presentations for the company's business. Designed and lead Hyperion Financial Management engagements.

- Designed, prepared, and delivered functional training programs for Hyperion/Oracle customers. Interfaced with existing and potential clients to address system and solution issues.
- Attained \$4M services in the Oracle/Hyperion BI reporting from upselling activities. Assisted in preparing Statement of Work for Requests for Proposals for commercial and public sector markets.

WISE-SOFT LLC, MINNEAPOLIS, MN

MAY 2007 – Nov 2007

Practice Manager/Sr Principal Consultant

Managed the Business Intelligence and Analytical Reporting practice. Designed sales and marketing campaigns in support of business capture. Designed and led Hyperion Financial Management engagements.

- Designed, developed, and delivered training programs for the customer base, which was adaptable to client customizations.
- Prepared Statements of Work for Requests for Proposals.
- Worked with existing and potential clients on solution issues and remedies for identified errors.

IBM, MCLEAN, VA

NOV 2005-MAY 2007

Managing Consultant

Responsible for building and implementing Hyperion Financial Management at Carlson Marketing Group in Plymouth, MN. The requirement was to address complex ownership within CMG application specifically, address complex HFM Rule writing requirements, and contribute to the next wave for rollout during 2006

BEARING POINT, MCLEAN, VA

May 2005 – Nov 2005

Manager– Public Sector Hyperion BI Reporting MCLEAN, VA, STAMFORD, CT

Managed business capture for US Federal clients that would use Hyperion software products. Engaged in business development and coordination of a Hyperion strategy within Bearing Point and its Federal Clients. Managed existing Hyperion HFM implementations that needed prior expertise.

HYPERION SOLUTIONS, STAMFORD, CT

Nov 1999-May 2005

Lead Consultant

Managed multiple Hyperion Financial Management (HFM) and Hyperion Enterprise projects. Responsibilities included: the full-life-cycle development of applications for clients, including proposal development, requirements analysis, design, development deployment, and support for HFM applications. I identified and secured necessary resources for HFM engagements to include both IBM and partner staff. I mentored other consultants within the organization to broaden the team skills. I performed Pre-Sale demonstrations for potential clients.

EDUCATION

Strayer University, Masters of Business Administration

Strayer College, Bachelor of Business Administration

Certifications

FCCS - OPN, ORACLE EPM, WORKIVA, ORACLE HYPERION FINANCIAL MANAGEMENT 11 ESSENTIALS, ORACLE FINANCIAL MANAGEMENT 11.1.1 PRE-SALES SPECIALIST, ORACLE FINANCIAL MANAGEMENT 11.1.1 SALES SPECIALIST, ORACLE FINANCIAL MANAGEMENT 11.1.1 SUPPORT SPECIALIST, ORACLE UNIFIED METHODOLOGY LEVEL 1 AND 2, WORKIVA PLATFORM AND ESSENTIALS 2021, FUNDAMENTALS OF PROJECT PLANNING AND MANAGEMENT - UVA

Computer Skills/Software

Oracle EPM Cloud – FCCS/EPBCS/ARCS, Workiva, CXO, EPM 11 Financial Management, Hyperion Financial Management System 9, Hyperion Enterprise 6. x, Hyperion Reporting, Hyperion Financial Data Management, Kedit, Windows Operating Systems, MS Office Suite, FAS for Windows, Platinum Accounting Software