

## Summary

Self-driven professional with MBA, Finance degree and experience in fast paced, high pressure environments. Proven record of producing high-quality deliverables in the areas of startup assessment, portfolio management, financial analysis and modeling, and business case development; Consistently successful in presenting these to stakeholders to drive decisions and results. Ability to consistently make quality business decisions within budgetary and timeline requirements. Dedicated work ethic and a passion for managing complex issues with diverse teams. Excellent written, verbal and technical skills including the Microsoft Office suite.

## Experience

### **Entrepreneurial Accelerator Program (EAP) a division of the Biomedical Research Foundation of Northwest Louisiana (BRF) – Sr. Financial Analyst (September 2015 - Present)** *Shreveport, LA*

Assess and screen startup business opportunities for economic development in Northwest Louisiana

- ▶ Assist in Project Management of Launch Network, an expansion program reaching 21 Parishes in N. Louisiana
- ▶ Conduct financial analysis and valuations, build and update financial models and participate in financing discussions
- ▶ Conduct specific industry and market research
- ▶ Assist in writing business plan, build pitch books and prepare investment memos for the exclusive Executive Director
- ▶ Interact and assist in managing startup company teams, consortium partners, advisors and consultants
- ▶ Review legal contracts
- ▶ Utilize professional network to assist Entrepreneurs in establishing their startup
- ▶ Manage four startup Angel investment funds

### **Tyco Integrated Security (formally ADT Commercial Security) (May 2011 – September 2015)**

#### **Senior Project Manager – Mergers and Acquisitions (April 2015 – September 2015)** *Boca Raton, FL*

Conduct due diligence review and support for upcoming M&A activity while managing tactical project plan.

- ▶ Create acquisition integration templates including project kick off deck and integration playbook

#### **Program Director (February 2013 – April 2015)**

*Boca Raton, FL*

Accountable for overall performance of the Order to Cash Program, ensuring the project delivers the agreed business benefits.

- ▶ Built business case and ROI supporting \$40M investment for new ERP implementation and successfully presented to Executive Leadership resulting in support and funding
- ▶ Acted as a chairperson to the Executive Steering Committee and arbitrator for key design decisions
- ▶ Created program documents including: request for proposals (RFPs), statements of work (SOWs), project plans and work breakdown structure (WBS)
- ▶ Successfully established Organizational Change Management (OCM) and Data Governance competencies within the organization resulting in the creation of five new jobs

#### **Interim Director - Order Management and Operations Support (October 2012- February 2013)** *Indianapolis, IN*

Directly managed a team of ~140 within the Order Management and Operation Support functions that served both external and internal customer requests while focusing on customer support and process efficiency.

- ▶ Established and ensured adherence to service levels and scorecard parameters while providing performance feedback and coaching opportunities for Unit and Team Managers to communicate to front line associates
- ▶ Led the day-to-day operations for eight teams at the Account Services Center including: Order Management, Credit Worthiness, Quality Assurance, Training, Disconnects, Data Integrity, Cash Applications, and Correspondence
- ▶ Coordinated with the Billing and Collections Director to ensure all operational functions were supporting the generation of cash, reduction of expenses and minimizing delinquent A/R

#### **Senior Manager/Director - Order to Cash (May 2011 - October 2012)**

*Indianapolis, IN*

Accountable for all programs and business systems that support the Order to Cash business function. Provided consultative support, participation and expertise to business partners and helped drive process re-engineering and continuous improvement.

- ▶ Developed and managed program / project portfolio for the Order-to-Cash business function
- ▶ Worked with TycoIS North America Leadership to understand project priorities, timelines, and financial implications
- ▶ Coordinated with IT Business Delivery Team leads to ensure alignment of projects and sound integration strategies
- ▶ Conducted program/project reviews to identify and address issues or roadblocks
- ▶ Developed and planned communication strategies to ensure activities and accomplishments were communicated to senior management and project stakeholders

## Experience (cont'd)

### CapGemini - Lead Consultant (October 2009 - May 2011)

New York, NY & Indianapolis, IN

Responsible for deliverables while applying deep functional expertise in Financial Services and client handling skills to ensure engagement productivity. Increase efficiencies for clients, resolve issues and maintain overall client satisfaction.

- ▶ Developed a business case financial model and roadmap for a payments processing company which reflected a full payback plus savings in excess of \$20M over a 5 year period
- ▶ Created a sustainable and repeatable close process for a Bank Holding Company (BHC) and reduced the number of days to close from 15+ business days down to 10 business days
- ▶ Engagement experience including finance transformation, strategy development, OCM, and program management with a global BHC, a global Payments Processor, and large North American Insurer
- ▶ Directed client interfacing and project experience developing business cases, process mapping and implementing process improvements, change management, and request for proposal (RFP) responses

### Ernst & Young - FMA Supervisor (August 2007 – October 2009)

New York, NY

Managed internal financials including forecasting, budgeting, estimates-to-complete, profits, expenses, and revenue for Tax, Asset Management (AM) and various Global Mobility accounts, while managing a personal book of business.

- ▶ Successfully reduced revenue days from 45 to 22 days throughout the year and 18 days during year-end-close
- ▶ Provided engagement management advice to Tax Managing Partner, AM Lead Partner and other Tax Area Lead Partners and assisted in managing books of business while increasing profit and reducing revenue days
- ▶ Developed and implemented an efficient and streamlined process for billing over 1000 global mobility participants

### BearingPoint - Consultant (2005 - 2007)

Washington D.C.

Team lead for Financial Transformation Project at Department of Homeland Security (DHS), Immigration and Customs Enforcement (ICE), Federal Protective Service (FPS). Performed verification and validation (V&V) audit analysis on FPS accounts payable contracts for the purpose of reducing the negative service wide agreements.

- ▶ Maintained project work in progress budget to actual calculations and budget forecasting
- ▶ Identified out of balance accounts thru internal audits and proposed solutions to ensure accurate fund accounting
- ▶ Prepared reports with recommendations to reduce errors aiming to eliminate discrepancies between contract documentation and data in the Federal financial management system (FFMS), corrected overpayments made to the vendors, allocated payment to the proper accounting sources, and reconciled accrual errors

### McElroy Metal - Corporate Credit and Collections Manager (2004 - 2005)

Bossier City, LA

Analyzed the financial status and reputation of prospective customers applying for credit. Collected on delinquent accounts and non-sufficient funds checks for nine manufacturing facilities and over 40 retail locations across the United States.

- ▶ Developed a new credit-scoring model which reduced overall company credit risk; implemented credit policies and procedures that produced a streamlined accounts receivable process
- ▶ Evaluated large job requests in excess of \$1M for credit risk and maintained proficiency in US Mechanic's Lien laws

### Edward Jones - Investment Representative (1999 - 2003)

Bossier City, LA

Marketed individual investments such as Bonds, Mutual Funds, Stocks, CDs, Life insurance, Annuities, etc., prepared diversified portfolios and provided investment advice for individual clients, small businesses, and non-profit organizations.

- ▶ Analyzed investment instruments for client risk and suitability while establishing various types of accounts such as IRA, small business, trust, and 401(k)
- ▶ Taught adult continuing education courses at a Centenary College on current market conditions, portfolio diversification, and investment risk

## Education

### Louisiana State University, Shreveport, LA

- ▶ MBA, Business Administration

### Louisiana State University and Agricultural and Mechanical College, Baton Rouge, LA

- ▶ BS, Finance