Accomplished professional with strong financial and analytical background possessing extensive business operations, ERP software implementation and project management expertise. Energetic, influential, personable facilitator, presenter and negotiator focused on results driven, technology enabled solutions to maximize the investment in information, business and human resource management systems infrastructure. Diverse industry and structural knowledge with organizational change /transformation management, resource development, and business process management (BPM)**.** Over **twenty–five (25)** years of experience with SAP Enterprise Resource Planning **(ERP)** solutions ranging from **strategic leader/advisor** managing cross-functional, multi-site/multi-business local and global implementation projects to **subject matter expert** on design, configuration and implementation.

**CORE COMPETENCIES**

|  |  |
| --- | --- |
| * Organization and Operations Alignment | * Business Process Development and Change Management |
| * Business Operations Optimization | * New Business Initiatives |
| * Project Initiation and Planning | * Pre-merger and acquisition process management |
| * Project Operations Management and Control | * Post-merger and acquisition integration/transformation |
| * Enterprise Resource Planning Software Implementation | * Interim CFO/Controller/Financial Operations Advisor |

**EXPERIENCE**

**Profit Performance Advisors- DBA - *The Accelerx Group Inc*.*,* - Lansdale, Pa - Principal**

Advisory and facilitation firm specializing in process automation, optimization organizational alignment, through information technology investment maximization.

**Katzenberger and Associates, Inc.- North Wales, Pa- Principal (Merged into Accelerx Group 2004)**

SAP Centric Consulting Firm-Clients ranged from the Fortune 100 to SMB

**REPRESENTATIVE SAP ENGAGEMENT PORTFOLIO**

Have worked on a combined **forty-seven (47)** full or partial cycle implementations spanning **all project stages** encompassing business case development, project plan construction/estimating, requirements determination, resource development, deployment, gap analysis, business process reengineering, issue resolution management, configuration, custom code specifications, testing, **change - transformation management**, training, go-live assistance and post implementation support.

**Life Sciences – North American Business Unit of Global Entity – Business Acquisition SAP Integration**

***Project Lead Consultant and FICO Subject Matter Expert***

**Assignment Duration: 9 months**

* Advised IT and Business on project plan development to integrate acquisition into SAP Environment
* Participated in development, performance and analysis of IT infrastructure, business organization/process discovery and risk assessment of existing through end state entity
* Lead team responsible for business process, software application, data mapping, conversion integration and cut-over control and management
* General ledger consolidation, and usage of special ledger for interim roll-up reporting
* Hierarchy and master data object FICO/cross application structure development
* Subject matter expert for FICO and integration points between and among other applications (MM,PP,SD,PM,AM)
* Developed strategy to manage pre-transaction historical data

**Global Conglomerates Merger – Proprietary Non-SAP vs. SAP**

***FICO Subject Matter Expert***

**Assignment Duration: 9 months**

* Subject matter expert for FICO legal vs. operational entity reconciliation and end state hierarchy
* Subject matter expert for integration points between and among data objects and supporting SAP applications
* Liaison with acquiring entity for Non-SAP vs. SAP infrastructure, business organization/process/data reconciliation
* Lead consultant for retrofit/conversion and interfacing to non-SAP infrastructure
* Responsible for coordination of the strategy/tactics to manage pre-transaction historical data

**Global Aerospace and Industrial Products Merger – Oracle to SAP**

***Project Lead Consultant and FICO Subject Matter Expert***

**Assignment Duration: 13 months**

* Subject matter expert for FICO legal vs. operational entity reconciliation and end state hierarchy
* Advised IT and Business on project plan development to integrate acquisition into SAP Environment
* Led/coordinated effort to enable coexistence between two software platforms for interim period

**Global Aerospace, Automotive, Specialty Chemicals and Engineering Company**

**Assignment Duration: 3 Years**

***Corporate Project Lead Consultant and Business Unit Cross Application Integration Subject Matter Expert***

* SAP subject matter expert to Corporate Vice-president and Director of Global Strategic Planning and Finance
* Key advisor to executive sponsors for Global Business Unit cross entity SAP common architecture template
* Responsible for the review of the ERP business case and underlying new business data structure model
* Provided expertise on project scope definition, core business process requirements, software functionality, limitations and cross application impacts
* Key advisor to executive sponsors for Global Business Unit phased implementation roll-out strategy
* Liaison between corporate and business units to ensure/coordinate global architecture strategy for current and future roll-outs
* Subject matter expert for FICO legal vs. operational entity reconciliation and end state hierarchy
* Subject matter expert for data object cross business unit/process application integration

**Global Manufacturer and marketer of foodsand condiments**

***Project Lead and FICO Subject Matter Expert***

**Assignment Duration: 6 months**

* Key advisor to project leadership for next generation business implementation roll-out strategy
* Advised Project management on post “First Phase” future enhancement “features and functions” prioritization
* Project team lead for the development of future enhancement “proof of concept” impact analysis
* Liaison to SAP development
* Identified standard delivered, industry specific or cross industry configuration features/functions to leverage full capabilities of the software
* Reduced the need/cost for custom programming internal and external to the standard delivered software

**Power Generation Equipment Supplier and Plant Construction Firm** (Second Phase SAP Implementation)

***PS, AM and CO-Internal Orders Subject Matter Expert***

**Assignment Duration: 9 months**

* Responsible for the PS Business process definition, mapping and prototype configuration
* Included project catalogue definition, WBS hierarchy structure and node development, network integration, project order settlement, fixed asset settlement (AUC and Capitalization), basic plant maintenance and SD project billing integration.
* Proposed use of SAP internal orders (CO-OM-OPA) for less involved lower visibility project Initiatives

**Pharmaceutical Company**

***FICO Subject Matter Expert***

**Assignment Duration: 2 months**

* Engaged to preform pre-production FICO quality review and assessment
* Advised on post “Go Live” production risks
* Assessed first 24 – 48 hour and 30 day risk and remediation plan
* Assessed future enhancement “features and functions” prioritization
* Proposed adjustments to plan
* Advised on Center of Expertise support staffing, operation and project team transition

**Global Chemicals and Fibers Corporation**

***Project Lead and FICO Subject Matter Expert***

**Assignment Duration: 2 ½ years**

* Managed team of cross functional subject matter experts (FI, CO, MM, PP, SD)
* Developing and building “To Be” business process prototypes (FI-GL, CO – CCA, OM, ABC, PC)
* Master data management and correct data object mapping
* Coordinated with MM-PP on plant segment of material master, Production order management (PP and PPPI) - Routings, BOM’s, Back flushing, buffer stock, order settlement, period end activities (Close, WIP, variances)
* Preparing process gap analysis, configurations options and re-engineering recommendations
* Training and coaching client project team members on configuration features and functions
* Legacy system data mapping, cleansing and conversion
* Conceptual, functional and detail continuing legacy system interfaces
* User training and acceptance testing

**Foreign Based Global Pharmaceutical Company**

***Subject Matter Expert PS, CO-Internal Orders***

**Assignment Duration: 1 Year**

* Controller initiative to track Research and Development project
* Responsible for the PS Business process definition, mapping and prototype configuration
* Definition and development of project catalogue
* R & D project standard WBS hierarchy structure and node development,
* Limited small network integration
* Project statistical order set-up and reporting
* Project team SEM training

**Natural Gas By-Product Distributor**

***Lead Consultant and Subject Matter Expert***

**Assignment Duration: 1 Year**

* FI-G/l, AP AR
* Cost Center Accounting/ Activities
* Internal orders – (Statistical, Overhead and Investment)
* Asset Accounting

**US Subsidiary of German based automotive and industrial parts manufacturer**

***Lead Consultant and Subject Matter Expert***

**Assignment Duration: 2 Years**

* North American Roll-out phase of German Parent SAP Global Implementation
* “Mini-Big Bang” utilizing parent global template with configuration to US subsidiary business practices
* Responsible for procure to pay cross application integration
* FI-G/l, AP, AR
* Cross functional Master data conversion and management (FI,CO,MM,PP,SD)
* Cost Center Accounting/ Activities
* product costing linked to PP production orders, BOM’s, work stations, routings, goods issues, confirmations and settlement
* Basic COPA and PCA

**SAP Domain Knowledge**

|  |  |
| --- | --- |
| Cost Center Accounting (CO - CCA) | General Ledger Accounting (FI - GL) |
| Overhead Cost Controlling (CO - OM) | Accounts Payable (FI- AP) |
| Activity Based Costing (CO - ABC) | Accounts Receivable (FI - AR) |
| Product Cost Controlling (CO - PC) | Asset Accounting (FI - AA) |
| Profitability Analysis (CO - PA) | [SAP PS (Project System)](http://www.gotothings.com/sapps.htm) |
| Material Ledger (CO - ML) | Profit Center Accounting (EC - PCA) |

**SAP Adjunct Module Knowledge**

|  |  |  |  |
| --- | --- | --- | --- |
| **Sales and Distribution - SD** | **Material Management - MM** | **Production Planning - PP** | **Material Requirements Planning - MRP** |
| SD Master Data | MM Purchasing | Make to Order (CR) | Production Orders |
| Sales | Invoice Verification | Make to Order (PIR) | Product Cost Planning |
| Billing | Inventory Management | Repetitive Manufacturing |  |
| Shipping | Inventory/Valuations | Process Industries (PP - PI) |  |

**SAP Experience Industry and Roles**

|  |  |  |
| --- | --- | --- |
| **Industry Group** | **Industry** | **Role** |
| Materials | Chemicals, Containers & Packaging | SME, Project Lead/Manager |
| Capital Goods | Aerospace & Defense, Electrical Equipment, Machinery | SME, Project Lead/Manager |
| Consumer Durables & Apparel | Apparel, Accessories & Luxury Goods | SME |
| Food & Staples Retailing | Food Distributors | Project Lead/Manager |
| Commercial & Professional Services | Commercial Services & Supplies | Project Lead/Manager |
| Pharmaceuticals, Biotechnology & Life Sciences | Life Sciences Tools & Services | SME |
| Automobiles & Components | Auto Components | SME |
| Retailing | Distributors | SME |
| Software & Services | IT Services | SME, Project Lead/Manager |
| Semiconductors & Semiconductor Equipment | Semiconductors & Semiconductor Equipment | Project Lead/Manager |

**OTHER CAREER HIGHLIGHTS**

**Project Initiation and Operations Management:** Key contributor in the **risk assessment, definition, development and organizational alignment** of project charter, scope, objectives, success factors and deliverables. Actively managed day to day tracking of progress, spend, task prioritization, risk mitigation, monitoring, communication and resource management.

**Business Process Analysis, Development and Change Management:** **Liaison between operations and IT** involved in **value driven business case scriptdevelopment**, **translating business needs/requirements** into operational software, validation, testing and management of change. Emphasis on utilizing the application technology landscape, organization, industry business process standards framework and regulatory policy/procedure compliance. Effectively communicated to stakeholders across broad demographic aligning mission and vision with strategic goals, objectives and operating roles/responsibilities. Built trust, commitment and acceptance through proactive effort to stimulate culture of problem identification, solving and expectation management.

**New Business Initiative:** Facilitated organizational top down – bottom up assessment, clarity and alignment of goals, unintended consequences, barriers and assumptions. Engaged in scenario development to leverage/enhance existing organizational human and physical assets to maximize investment return post initiative and impact on operational and cultural change

**Pre-merger and acquisition process management**: Led assessment/reconciliation of data objects/structures of target to acquiring entity. Worked with **M & A** team to develop post acquisition interim and long term systems integration and data conversion plan.

**Post-merger and acquisition integration**: Facilitation of post transaction strategy and tactics planning, top down – bottom up organizational communication and alignment, organizational culture, identification of process and technology integration synergies, assessment of adaptation issues, change implementation and management support. Member of systems integration team mapping, developing, prototyping, demonstrating, testing SAP feature/function solutions.

**Business Operations Optimization:** Actively engaged in intra and cross organization strategy clarification, tactical business process design and change management implementation, developed measurement and accountability guidelines

**Interim CFO/Controller/Financial Operations Advisor:** Oversight of various engagements involving:

* + Day to Day operational management, control, Cash Flow Optimization
  + Financial Reporting Finance/Accounting Oversight/Expense Reduction Margin Analysis and Improvement
  + Decision-making indicators (Scorecards and Metrics)
  + Financial systems technology adoption, accounting best practices and internal controls improvement
  + Enhancing/expanding system utilization
  + Financial restructuring and investment strategies
  + Pre M & A transaction preparation
  + Post M & A alignment, integration and transformation

**EARLY CAREER**

* **Director** – North American Global Strategic Accounts Initiative - SAP America, Inc.
* **Director National Partner Relations** - SAP America, Inc.
* **National Director of Professional Services** - SAP Australia, LTD. - Sydney, Australia
* **Senior Consulting Manager** – Professional Services- SAP America, Inc.
* **Project Manager**- SAP America, Inc.
* **Applications Consultant/Pre-sales Engineer**- SAP America, Inc.
* **Assistant Controller** - Manufacturing Operations
* **Internal Audit** – Manager, Operations Audit Supervisor, Senior Operations Auditor
* **Accounting Operations** - Rotational assignments in G/L, A/P, A/R, AM, IM, CC

**EDUCATION**

* **Temple University -** Philadelphia, Pa **-** MBA - Finance
* **Temple University -** Philadelphia, Pa - BBA - Accounting
* **Montgomery County Community College** - Blue Bell, Pa AAS - Business Administration
* **Continuing Professional Education -** Certified Public Accountant requirements are current

**PROFESSIONAL LICENSES AND DEVELOPMENT INVESTMENT**

* **Certified Public Accountant** - Active License – Commonwealth of Pennsylvania
* **Continuing Professional Education Sponsor license** - Commonwealth of Pennsylvania
* **Keynote speaker** for SAP America and The HMC Institute’s “Total Cost of Ownership” Seminar series
* **ShellingPoint** - Alignment Optimization (AO) - Software Partner
* **The Gabriel Institute** - “Teamability”Human Infrastructure - Software Partner
* **Processgene -** Business Process Management/Governance, Risk, Compliance- Certified Software Partner
* **ASI** - Certified Group Facilitator
* **Innermetrix** - Certified in Attribute Index, DISC and Value Index
* **Total Quality Institute** - Certification in Executive Facilitation
* **Total Quality Institute** - Cycle Time Reduction
* **Total Quality Institute** - Variation Reduction
* **Total Quality Institute** - Small Business Process Improvement

**SOFTWARE EXPERTISE**

* **SAP ERP (25 + years’ experience)** – FICO, PS, AA, MDM, Application Integration
* **Microsoft Suite (25 + years’ experience) –** Outlook, Office Suite, Access, Projects, Visio, One Note
* **Google Apps**
* **Intuit Products (20 + years’ experience)** – QuickBooks, QuickBooks Enterprise, QuickBooks Online, Turbo Tax
* **Insperity Expense Management (15 + years’ experience)** -Expensible (T & E) with integration to QuickBooks

**OUTSIDE INTERESTS**

* Treasurer of the Traffic Club of the Lehigh Valley
* Advisor to the Traffic Club of Philadelphia
* Temple University “Tempal” Program to mentor and host foreign exchange students
* Temple University Fox School of Business Alumni Association Board of Directors –former chair of strategic planning committee
* Temple University's Enterprise Management Consulting Board of Advisors