# *Combination Technology, Financial, and Supply Chain Professional having led several systems implementations both from a consultant and in-house perspective.*

Experienced business professional accomplished at business systems design including financial, supply chain management, and manufacturing. Capable of reengineering sales, marketing, and business processes through the effective use of IT systems and infrastructure. Detail oriented manager with multitasking capabilities. Effective communicator and team builder who can lead one to leverage business systems for maximum efficiency and productivity.

Significant accomplishments:

- Designed and implemented highly automated ERP, sales forecasting, and financial reporting system that aided in the turnaround of an unprofitable enterprise to a profitable facility.
- Defined, designed, specified and implemented all business processes across various industries both locally and globally which improved employee utilization and integrity of business information used for decision support.
- One of the first 50 individuals in the world to be Master Certified on Microsoft Dynamics AX 3.0 and maintained the Professional Certification on versions 4.0, and 2009
- Attained Certified Solutions Specialist in AX2012
- Bachelors Degree in Accounting

## Work Experience

Hi-Vue Holdings, Inc,

1915 Almeter Rd. Akron, OH 44306

#### CEO / President

Holding company for all wholly owned divisions. With limited input from legal resources, I personally performed the Research, Investigated and Devised the correct business structure strategy to change financial reporting requirements of all underlying subsidiaries to gain favorable tax strategies while placing liability protections around each legally owned division.

#### Hi-Vue Farms, LLC

1915 Almeter Rd. Akron, OH 44306

#### Joint Owner

Hi-Vue Farms is a small family owned farm in the business of supplying organic and naturally produced/grown products. We currently raise Chickens, Rabbits, Horses, and operate a growing Apiary. All products servicing our farm and sold from our farm are Ohio local.

#### **Entegral Solution Partners, LLC**

1915 Almeter Rd. Akron, OH 44306

#### Solutions Architect / Partner – Microsoft Business Solutions ERP Partner (Dynamics AX)

Design, setup, implemented and support – including help desk - of ERP applications. Functional Areas include AP, AR, GL, Project Accounting, Inventory Management, Costing, BOM's/Routes, Production, Master Planning, Human Resource Management and related System Configurations per module. Secondary tasks included Security definition and setup, CRM, Fixed Assets and Projects.

Serve as Ohio and Midwest Regional Account Manager. Played pivotal role in startup of the company growing the customer base to four registered customer accounts. Assembled team of dedicated independent functional and technical resources to build product. Managed the finances of the company and saw sales growth grow to nearly \$500K in revenue.

#### March 2016 to Present

March 2016 to Present

#### November 2011 to December 2016

Work with partner as integral member to develop ISV solutions for Dynamics AX Product for process manufacturing industry focusing on Steel, Plastics, Upholstery and other Rolled products. Assisted in devising market strategies to take product to market upon completion.

#### Hi-Vue Solutions, LLC

#### September 2008 to Present

1915 Almeter Rd. Akron, OH 44306

#### Solutions Architect / Owner – Microsoft Dynamics AX

Design, setup, implemented and support – including help desk - of ERP applications. Functional Areas include AP, AR, GL, Project Accounting, Inventory Management, Costing, BOM's/Routes, Production, Master Planning, Human Resource Management and related System Configurations per module. Secondary tasks included Security definition and setup, CRM, Fixed Assets and Projects.

Responsibilities and activities included the Administration of various project management activities, sales and marketing, and all supporting business roles for fifteen Hi-Vue Solutions customers in support of AX3.0, AX4.0, AX2009, AX2012 (all releases), and AX7.

- Implementation and support of AX3.0, AX4.0, AX2009, AX2012 RTM, R1, R2, and R3
- Supported upgrades of over ten AX 2012 upgrades from earlier versions on AX with focus on T&L, Inventory Management and Costing, and Financials
- Designed, Tested, and implemented a Consignment materials module in Dynamics AX
- Designed and Implemented MLOH cost accounting methodology in the vanilla framework of Dynamics AX
- Architected and implemented an EDI 850/860 methodology in Dynamics AX
- Assisted with data migration of Dynamics AX to SAP
- Assumed help desk responsibility for Dynamics AX projects for construction element of business
- Developed all Engineer to Order Methodologies and Rules based configurations for metals industry fabricator
- Designed and implemented steel industry specific requirements to perform vertical functional requirements
- Engaged directly with several AX end user implementations to replace Microsoft partner and bring implementation live with a team of independent resources including myself.
- Devised AX Projects module strategies to cover lifecycle management of product build, parts replacement/tracking, fields services and warranty
- Implemented AX CRM / Sales and Marketing module for several different markets
- Analyzed and devised simplified pricing strategies resulting in market growth
- Architected sales and marketing, finance and field service modifications to close identified gaps in base software
- Designed a new shop floor control function time and reporting and production reporting process to utilize Dynamics AX Shop Floor Function methods while changing the reporting methodologies to use standard and net bundled time.
- Instructor for AXUG Trainer for online training in AX Academy and served as roundtable/presenter for Dynamics Communities Summit and conventions

#### Agility, Inc. / Agility Business Solutions (ABS)

7000 Fitzwater Rd., Suite 102 Brecksville, OH 44141. ABS (a wholly owned subsidiary of Agility) serves the Microsoft Dynamics AX customer base and was formerly part of a joint venture with Microsoft Gold Certified partner mcaConnect, LLC. Agility, Inc serves the AS/400 MAPICS customer base.

#### Business Application Consultant, Solutions Architect, Project Manager – Microsoft AX Software.

AX application modules include AP, AR, GL, Inventory Management Costing, BOM's/Routes, Production, Master Planning, System Configurations. Secondary tasks included Security definition and setup, CRM, Fixed Assets and Projects. Industries included electronics manufacturing, precious metals, distribution, vacuum science, solar energy, industrial equipment and product brokerage.

#### May 2000 to September 2008.

- Analyzed, defined, designed, project managed and self implemented an alternative energy manufacturing company from R&D startup phases to current production phase. Supervised and directed additional consultants in later expansion phases.
  - Phase I was allotted a three month timeframe and was completed on time and under budget. Project consisted of Financial reporting and intercompany accounting for the international operations, an energy service division, defining corporate financial operations per US GAAP requirements, implementation of Customer Relationship Management (CRM), and Sales Order Entry for the global supply chain.
  - Phase II was allotted a 6 month timeframe which correlated to year end reporting. Project which consisted of implementing a Corporate Holding Company, US manufacturing operations, and financials for a field services project company was delivered on time and on budget.
  - Phase III consisted of re-engineering of the order entry process for the centralized sales office in Mainz, Germany. Defined requirements through process mapping with company resources. Constructed a relationship with a local German MBS Partner to assist with project development. Specified code requirements absent from base product which would be adapted by Microsoft in following release.
  - Phase IV consisted of a multi-project implementation of Manufacturing in Germany, a German financial holding company and a re-engineering of aspects of finance and purchasing
  - Phase V included the upgrade of AX3.0 to AX4.0. Both facility resources and other Agility resources were placed under my supervision to ensure that supplanting 3.0 function with 4.0 function met requirements. Tasks involved were baseline testing and troubleshooting of all business processes and custom code enhancements, user test scripts and documentation creation, management of conference room pilot testing, and go live support
  - Phase VI (currently underway) is to define requirements and establish software function for Malaysian manufacturing and Singapore financial holdings as well as to provide helpdesk support, user testing and debugging, and continuous re-engineering and adaptation of business processes
- Designed, tested, trained, and implemented a precious metals invoicing and metals tracking system for an electronic component supplier. Provided many financial enhancements to base software including 4 way AP matching, ADP GL uploads, Electronic banking (ACH, Positive Pay), and consignment
- Assisted with the re-engineering of the planning and procurement process for a Pittsburgh, PA distribution company which included Design and implementation of historical usage inquiries, a master planning blanket release system, an electronic PO media dispatch system with digitized signatures.
- Defined, developed specifications, and deployed underlying CRM/Logistics business process architecture for a machine brokerage business.
- Provided ongoing user training sessions in both business processes and the application of software to business processes which includes compliance with GAAP, SOX, and ISO.
- Presales activities included Participation in developing demo scripts, build out, and demonstrations of product function

#### Manufacturing Systems Consultant - MAPICS Software.

MAPICS modules included Accounting Management (AP/AR/GL), International Financial Management (IFM), COM, PUR, IM, PDM, EPDM. Industries included automotive, plastics and molding, electronics, industrial equipment, consumer goods

- Orchestrated and managed a fixed bid rapid implementation of a multinational order entry, financial and inventory control system for JLG industries for Sweden, Norway, Denmark, France and Germany. Supervised a team of 3 consultants and 2 developers and worked in conjunction with JLG project management team to coordinate deployment and timeframes. Project managed tasks to bring project to completion that led to overall on time and on budget delivery.
- Redesigned and implemented the financial reporting systems of both an industrial equipment manufacturer and a tier-1 automotive supplier to leverage efficiencies of the software.
- Defined business processes and implemented solutions in areas of AP, AR, GL, Cost Accounting, Inventory Management, Purchasing, Sales Order Entry, and Production Manufacturing across a multitude of customers.
- Provided user training in both business processes and the application of the software to this business process

 Presales activities included Participation in developing demo scripts, build out, and demonstrations of product function

#### Cambridge Industries.

#### September 1999 to May 2000

1455 Imlay City Rd. Lapeer, MI 48446.

#### Controller / I.S. Administrator.

Supervised four accounting employees and two temporary employees. Full charge accounting executive and plant staff member. Served as temporary Plant Manager, Operations Manager, and shop floor supervisor. Directly involved with production decision making, alternative production and machine utilization, and determination of alternatives for improved yields. Proposed and presented business growth opportunities including asset utilization solutions throughout the facility, potential sales niches, and leasing options. Defined efficient processes through use of AS/400 to facilitate a Corporate consolidation of AP to mitigate better cash flow opportunities.

- Primary responsibilities included implementation of new forecasting and budgeting tools (annual, monthly and weekly forecasts.) improving the financial visibility. Evaluation of the facility financial position – specifically balance sheet, account reconciliations, and reserves. Strengthened internal controls throughout the facility in areas of Purchasing, A/P, Inventory, Costing, Fixed Assets and Capital, etc. Revised standard cost system and created new Material, Labor and Burden standards that revealed opportunities for price increases in General Motors product lines.
- Additional responsibilities included sourcing a new ERP software package for the entire corporation, the review and improvement of existing I.S. reports expediting the monthend close process, proposing new reports which were utilized corporate-wide (17 plants), and developed corporate monthend close reporting package.

#### Mayflower Vehicle Systems, PLC.

#### October 1998 to September 1999

55 North Garfield St. Norwalk, OH 44857. .

#### Controller / I.S Manager

Hired as Assistant Controller which led to promotion to Plant Controller and IS Manager after 6 months. Supervised three accountants, three I.S. employees, and two temporary clerical employees. Full charge accounting executive and plant staff member. Initiated a foundation to make accounts payable a profit center with a potential of \$800K/year bottom line effect. Championed the Accounts Payable process after repetitive employee turnover and was once again current within 30 day of starting the process.

- Primary responsibilities were implementation of QAD MFG/PRO ERP system and to provide input in all areas of ERP business processes to ensure seamless transition; development of a new automated monthend reporting and forecasting tool which included both final results and 'what if' scenarios; and proposed growth opportunities of asset utilization solutions in e-coat, sales niches, and leasing options.
- Additional Responsibilities included Analyzed standard costs and developed processes to ensure accurate product data management input, developed reports using 'Results' Query tool, participated in QS-9000, and served as a QS-9000 Internal Auditor.

#### Dana Corporation – Cleveland Chassis Plant

#### September 1997 to October 1998

7700 Oak Leaf Rd. Cleveland, OH 44146.

#### Plant Controller / I.S. Manager.

Supervised three accountants and one I.S. Administrator. Key player in turnaround of a non-profitable facility to a highly profitable entity while reducing monthend closing from four days to one. Several key drivers in turnaround were development of volume based pricing strategies yielding most favorable benefits under pricing percentage constraints, creation of a 10 Level Burden Study that assessed operating expense at across capacity levels, creation of a costing tool to estimate material, labor, and burden rates for cellular manufacturing, and prepared monthly budget forecasts and 10 day trend reports that would be standardized across the division throughout the division

- Primary responsibilities included balance sheet reviews, reconciliations, reserves, and write-offs; preparation of NPV, ROI, and Payback analyses on capital procurement; implementation of fixed asset barcode tag system; implementation of inventory control procedures (Scrap Ticket Reporting, Shop Packet Production Reporting, Vendor Returns, and Outside Servicing Control Procedures); vendor scorecard reports and variance analysis; ownership of the MAPICS cost accounting environment; and the definition accounting functional work instructions.
- Additional Responsibilities included ERP Team Leader, internal controls for information used in MRP planning, report creation and specification such as slow-moving obsolete inventory reports, sales and cost of sales via AS/400, ownership of labor time reporting system used in efficiency and utilization reports by cell, and improvements and upgrades to PC/Network and AS/400 Environments.

### Dana Corporation – Fort Wayne Audit

2424 W. State Street Ft. Wayne, IN 46808.

#### Internal Auditor.

Responsible for resource planning and scheduling for Ft. Wayne group. Performed all disciplines of Financial Accounting Audits including analysis of systems, documentation and testing of Inventory, AP, AR, Purchasing, Sales, Costing, and Fixed Assets. Issued recommendations and had audit issue consultations. Performed balance sheet reviews. Developed audit testing plans and statistical methodologies. Assisted with Information Systems and ERP Audits.

#### Dana Corporation – Audit Trainee Program

#### Cost accountant, General Accountant, Interim Controller, IT Administrator

Worked in two plants of the Gresen Hydraulics Division - (600 W. Belt Line Rd. Lancaster, TX 75146 and Corinth, MS 38834). Supervised two accountants and one IT networking specialist. Prepared and analyzed monthly performance forecasts trends for facility performance projections. Co-Chaired Activity Based Costing/Activity Based Management Committee and Implemented an ABM Environment. Administered all AR invoicing functions. Prepared A/P and cash forecast requirements. Maintained fixed asset system. Calculated material, labor & burden rates and analyzed variances. Maintained MAPICS Cost Accounting Environment - Item Master Files, Routings, Bills of Material, & ECO's. Performed inventory audits. Administered hourly payroll, governmental reporting, and bank reconciliations. Supervised and assisted factory tasks including Shipping/Receiving, Machine Operations, Assembly & Test, Supervision, EIM, and ISO 9001. Served as CIS/MIS liaison between Lancaster facility and four other plants within the division. Developed cost, financial, production schedules, and sales forecasts reports via AS/400 Query. Analyzed, Suggested, and Implemented Improvements and Controls to PC & Network Environment. Maintained & Repaired PC's, Mac's, and AS/400. Instructed employees on productivity improvements through use of computer systems.

# Formal Education

*Mississippi State University.* Mississippi State, MS 39762. *B.P.A. - Accountancy.* August 1992. *Northeast Mississippi Community College.* Booneville, MS 38824. *Engineering.* May 1989.

# **Professional Certifications**

*Microsoft Business Solutions -* Microsoft Certified Business Management Solutions Professional - Application for Microsoft Dynamics AX 3.0 (Former Master Certification)

*Microsoft Business Solutions -* Microsoft Certified Business Management Solutions Professional -Application for Microsoft Dynamics AX 4.0

*Microsoft Business Solutions -* Microsoft Certified Business Management Solutions Professional -Application for Microsoft Dynamics AX 2009

*Microsoft Business Solutions -* Microsoft Certified Business Management Solutions Specialist Dynamics AX 2012

*Certified Instructor AXUG* – Dynamics Communities AX User Group instructor – Inventory Management Setup and Costing

July 1996 to September 1997

# August 1992 to July 1996

#### **Additional Education and Training**

MBS Certified Dynamics AX 2012 – Trade & Logistics and Financials. 2011
MBS Certified Dynamics AX 2009 – Trade & Logistics, Production, Human Resource Management. 2009.
MBS Certified Dynamics AX 4.0 (Axapta) – Trade & Logistics, Finance, Production, Human Resources. 2007.
MBS Certified Dynamics AX 3.0 (Axapta) - Production, Trade/Logistics, Finance, Questionnaire modules. 2005.
MBS Axapta E-Courses (Microsoft Dynamics AX). 2003 and ongoing.
Navision Axapta Seminar. Navision University - Georgia. May 2002
Microsoft Great Plains E-Courses. January 2002.
MAPICS IFM/Cost Accounting/Accounting Management. MAPICS University. September 2000, March 2001
QAD MFG/PRO Training. Andersen Consulting. February 1999.
QS-9000 Auditor Training. Bert Scali. Author - QS9000 Internal Audit Primer.
PeopleSoft Payroll Processing. Dana Corporation. February 1998.
Measurements That Matter: Designing Effective Internal Reporting Systems. Baylor University. October 1997.
Product Cost Analysis. Dana University. August 1997.
How to Use Personal Skills for Effective Managing. Dana University. March 1997.
Using Supervisory Skills to Get Results. Dana University. October 1996.

Problem Solving and Decision Making. Dana University. August 1995.

*Financial Management Training Seminar.* Dana Corporation Audit Staff Seminar. May 1993, 1994, 1995, 1996. *Activity Based Management for a Competitive Advantage.* ICMS Program. August 1992 to January 1993.

#### **Professional Activities and Personal Interests**

Member – AXUG, Served as Director of Membership AXUG Ohio Chapter; Institute of Management Accountants (IMA) and Institute of Internal Auditors (IIA); fishing; farming; music; motorcycling; home audio/video; home improvement; finance/investing; automotive restoration; auto racing

#### **REFERENCES AVAILABLE UPON REQUEST**