

Sr. Dynamics Consultant

Education:

Bachelors of Science Business Administration Degree in Finance
Oklahoma State University May 1989

MS Dynamics GP Certifications: Financials 2013
Report Writer 2005

Core Competencies, Dynamics GP:

- Financial report writing in Management Reporter.
- SmartConnect integration and automation.
- Data conversion and integration via Integration Manager and SmartConnect.
- Distribution series: POP, SOP, and Inventory Control.
- Human Resources and Payroll.
- Fixed Assets Module.
- Collections Management.

Work History:

Company Confidential

November 2009 – Present

A Microsoft certified partner firm specializing in new implementations, ongoing support, training, and process documentation.

President / Owner

Responsibilities:

- Business process analysis.
- System design and solution development.
- Solution sales.
- Implementation project management.
- End user and super user training.
- Business Portal implementation and support.
- Break-fix troubleshooting and resolution.
- Report writing in SmartList Builder, SQL Reporting Services, Management Reporter.
- Migrate reports database from FRx to Management Reporter and performed classroom training.
- Direct team of 4 subcontractors providing oversight and status reports.

Accomplishments:

- Successfully processed 3 upgrades from GP10 to GP2010 including customizations and financial reports.
- Provided information system support for \$500M annual revenue petroleum company.
- Designed and implemented Purchase Order system providing process documentation and training.
- Developed remote Requisition approval program utilizing text messaging.
- Developed Excel reports based on customized SQL views via SmartList Builder.
- Developed daily reports in SQL reporting services with overnight email distribution to provide daily cash position and outstanding Purchase Order reporting.

Company Confidential

August 2008 – November 2009

Located in Houston, TX and serves primarily publically traded multinational corporations in the petroleum and petroleum services industries.

Senior Associate

Responsibilities:

- Manage implementation team, coordinating configuration, development, testing, and training schedules.
- Prepare project status reports and conduct project status meetings.
- Design system configuration based on requirements and analysis.
- Ensure timely filing of 10Q and other SEC required documents.
- Configure and setup Business Portal HRP Self Service Suite Profiler, Benefit Self Service, and Time Card.
- Install, customize, prepare user guides, and train on ESLA Latin translated Dynamic GP client in Mexico.

Accomplishments:

- Maintained 90%+ utilization.
- Achieved superior customer satisfaction rating.

Company Confidential

November 2004 – August 2008

A Microsoft Gold Certified Partner, two time Microsoft Global Partner of the year recipient, and one of Microsoft's largest providers of Dynamics products and consulting.

Senior Consultant**Responsibilities:**

- Lead implementation teams to successful go-live directing task completion, customer signoff, and ensuring adequate and complete communication.
- Manage client relationship setting expectations and monitoring project scope.
- Write specification of project tasks to be measurable and deliverable.
- Perform discovery interviews to prepare, "as is" documentation and flow chart data and processes.
- Write requirements analysis, design document, gap analysis, and testing plan scripts.
- Write customization specifications and manage development.
- Convert customer, vendor, and employee data into SQL tables for use with DTS or import format compatible with Integration Manager.
- Write FRx reports pulling from multiple companies and integrating with external data contained in Excel.
- Plan and execute upgrade process steps to minimize downtime and allow for adequate testing of data and system functionality.
- Conduct training per MS Dynamics GP manuals for HR/Payroll, Payables Management, Receivables Management, GL, Bank Reconciliation, Fixed Assets, FRx, and Purchase Order Processing.

Accomplishments:

- Lead 4 major implementations to successful January 1st live dates in industries of plant nursery, municipal government, assisted living facilities management, and transportation logistics.
- Implemented two HR/Payroll sites with 800 to 1,500 employees.
- Implemented MS Dynamics GP Control Account, Encumbrance, Interfund, and Grant Management.
- Implemented Binary Stream Property Management.
- Implemented MC2, Advanced Intercompany Transactions for GL, AP, AR, and payroll distributions.

Company Confidential

May 2003 – November 2004

A local MS Partner and provider of Dynamics consulting and product customization.

Consultant**Responsibilities:**

- Perform lead consultant and project management duties for a team of 4 consultants.
- Conduct discovery interviews and prepare requirements analysis.

- Manage client relationship setting expectations and monitoring project scope.
- Write design document, gap analysis, and customization specification.
- Subcontract programming customizations.
- Convert customer, vendor, and employee data into SQL tables for use with DTS or import format compatible with Integration Manager.
- Write FRx reports pulling from multiple companies and integrating with external data contained in Excel.
- Assimilate Solomon functionality and methodology to become profitable member of the team.

Accomplishments:

- Implemented HR/Payroll, GL, AP, Bank Reconciliation, eBanking, and Fixed Assets for a restaurant chain with 3,500 employees, 3 divisions (chains), and 31 locations.
- Used Solomon transaction import to convert 8 years of historical transactional data exported from JD Edwards accounting software.

Company Confidential

October 2002 – May 2003

A small group of consultants specialized in construction and contracting. The primary product represented and serviced was Master Builder, by Intuit.

Sales Consultant

Responsibilities:

- Sell, implement, train, and customize job costing, estimating and project management software solution.
- Write work orders defining scope, estimated hours, and completion date.
- Manage ongoing customer relationship, engagement scope, and communication.
- Network and cold call lead generation.
- Demonstrate construction business management software.

Accomplishments:

- Closed \$40K in sales of product and services.
- Performed \$30K in consulting work.

Company Confidential

May 2002 – October 2002

A small firm that provided professional services to oil and gas production companies.

Sales Consultant

Responsibilities:

- Develop marketing strategy identifying and prioritizing prospects.
- Write general benefits statement and prospecting call script.
- Set and maintain weekly prospecting call average.

Accomplishment:

- Provided an average 5 leads per week.

Company Confidential

April 2001 – April 2002

A regional Microsoft partner serving Oklahoma, Kansas, and Arkansas.

Applications Consultant

Responsibilities:

- Maintain current knowledge of product release, service pack, and runtime information for suite of accounting, human resources, and data base products including 3rd party integrations.
- Document workflow of all stakeholders to project and analyze for possible improvements.
- Research 3rd party software applications for form and function to meet client need.
- Perform demonstrations to sell consulting hours and software products to both clients and prospects.
- Manage customer relationships setting expectations, establishing goals, and setting performance standards to measure implementation success.

- Write sales proposals for software, consulting, customization, and management advisory services.
- Write specification for customization of functionality documenting input, function, output, and customer approval.
- Specialized in data import and integration
- Attend training and become subject matter expert on Modifier.

Accomplishments:

- Sold over 100 hours of consulting and \$20K of additional software product.
- Certified with Microsoft Business Solutions, Small Business Manager.
- Lead classroom training on product features and benefits.

Company Confidential April 1999 – April 2001

A not for profit company that specializes in the employment, training, and job placement of people with disabilities and barriers to employment.

Vice President Finance and Administration, Chief Financial Officer

Responsibilities:

- Provide leadership for corporate vision and management team goals.
- Oversee and manage accounting and human resources functions for 500 employees and \$11 million in annual revenues.
- Managed two profession employees, Controller and Director of Human Resources.
- Present financial statements and budget variance analysis to Board of Directors on PowerPoint monthly.
- Prepare reports for bank covenants, private foundations, and government oversight agencies.

Accomplishments:

- Implemented Great Plains Dynamics.
- Produced effective reporting and budget controls for 6 divisions containing over 80 departments via FRx.
- Improved communication with Board of Directors and management team by reporting results via PowerPoint graphic presentations monthly.

Company Confidential August 1998 – April 1999

A small manufacturer of screen printed apparel and novelties.

Controller

Responsibilities:

- Manage and/or perform all bookkeeping functions: payroll, accounts payable, and accounts receivable.
- Remit payroll tax and file monthly and quarterly tax statements.
- Age account payable and forecast cash requirements.
- Age accounts receivable, prepare customer statements, and perform collections.
- Close periods performing reconciliations, accruals, statement preparation, and trend analysis.

Accomplishments:

- Implemented purchase order system integrated with inventory and invoicing.
- Setup catalog ordering system standardizing inventory items, materials and labor costs.

Company Confidential January 1994 – August 1998

A start up business with operations in wholesale and retail mortgage origination, loan servicing, and securitization of purchased assets.

Controller

Responsibilities:

- Write and implement accounting policy and internal controls for startup mortgage origination and brokering business.

- Control funding, flow, and reconciliation of mortgage loan inventory averaging \$150M balance on monthly production of \$30M.
- Publish performance analysis reports by product line tracking loans from application to securitization.
- Supervise 4 professional bookkeepers in applying accounting policy.

Accomplishments:

- Institute 401K and cafeteria plan managing enrollment and withdrawal.
- Implemented cost controls, budgeting, and variance analysis.

Company Confidential

December 1989 – January 1994

A wholly owned subsidiary of Landmark Saving Bank. It sold and administered life, health, and accident policies.

Staff Accountant

Responsibilities:

- Manage portfolios of bonds, mortgage loans, collateral loans, stock and real estate investment.
- Develop spreadsheet accounting and investment tracking system consolidated over six companies.
- Prepare audit and financial statement (blue book) schedules.

Accomplishments:

- Conducted training for co-workers on spreadsheet and PC usage, networking, and setup.
- Became company expert on Lotus 123 based application that generated State required statutory accounting principal financial statements.

Other Work History:

Company Confidential

December 1998 – 2001

Avocational Instructor

- Teach 12 week course in communication and leadership skills.