



INNOVATION DRIVEN BUSINESS SYSTEMS PROFESSIONAL

I am a Strategist, a Futurist, and a Leader of Change Management. Identifying and executing opportunities for expansion, improvement, efficiency, and cost savings. As a vested business and financial professional, I understand the 'Why?' driving each business process.

PROFESSIONAL EXPERIENCE

Business Systems Consultant

2018 – present

B2B Contract with Acumatica Gold Partner

Acting as lead data and Business Intelligence solutions designer for a Gold Partner of leading Cloud ERP system (Acumatica).

- Managed implementations and configurations of Acumatica ERP system.
- Designed custom reports for major clients.
- Designed dashboards for executive and operational level users.
- Streamlined processes for clients by removing exporting data to external tools.
- Improved departmental processes for several clients.

Active Acumatica Certifications:



Acting VP Finance

2015 – 2017

Systems Inc.

Led Finance department of through the change of business model (from transactional to combined with SaaS) and extensive investments in Scientific Research and Experimental Development in multi-company environment.

- Introduced new collections procedure reducing Accounts Receivable over 60 days to zero and over 30 to 30% original values. Reduced bad debt to zero.
- Managed cost allocation and pricing evaluation based on time, material and overhead utilization.
- Spearheaded evaluation of new cloud-based billing methods along with new ERP assessment.
- Redesigned weekly Sales reporting package reducing preparation time from 8 hours to 5 minutes.



- Managed budgeting, variance analysis and pricing based on Activity Based Costing.



Principal Consultant, Finance and Strategy

2011 – present

Inc.

Performed several medium- to long-term senior finance, management and accounting contracts – comparable to a level of Chief Financial Officer, Corporate Controller and Assistant Controller. Industries served: Oil & Gas Service, Manufacturing, Construction, Government and Software development.

Major clients served and duties covered:

City of Calgary (Livery Transportation Services)

- Analyzed cost structure for the Division.
- Reviewed processes of all LTS staff.
- Analyzed fee structure for equitable treatment of all industries.
- Applied Activity Based Costing rules for equitable fees recommendation

KUDU, a Schlumberger Company

- Led financial processes associated with two-stage acquisition of KUDU Industries Inc. by Schlumberger.
- Restructured financial reporting in relation to ERP upgrade.
- Created automated reporting of Variance.

GroundForce geoDrilling Solutions Inc.

- Created all processes and procedures related with start of \$30 million drilling project.
- Redesigned Chart of Accounts.
- Led new ERP system implementation (MS Dynamics).
- Created, prepared and managed all subcontractor Agreements.

Panamount Inc. (o/a Cardel Lifestyles)

- Spearheaded change in corporate reporting. Introduced new qualitative reporting.
- Led evaluation of existing business systems with focus on utilization of ERP.
- Redesigned, prepared and reviewed monthly financial analysis summaries (Pro-forma). Reduced by 80% time required for their preparation (from 10 to 2 days) and number of data entry points to 1 (one) by applying automation.
- Directed cash management including: weekly and monthly forecasting, management of monthly loan draws up to \$5 million, liaison with banks and reporting to the executive team.

FilterBoxx Water and Environmental Corp.

- Prepared and reviewed reconciliations and monthly financial analysis summaries.
- Assisted Controller with monthly general ledger maintenance.
- Assisted with the preparation of monthly management financial reporting package.
- Reviewed accountant's and other team members' work.
- Assisted with fiscal year-end audit preparation.

Avanti Software Inc.

- Managed all financial and treasury functions of SaaS business.
- Took part in CICA 5970 Audit and preparation of compliance procedures.

Staff Accountant

2009 – 2011

Chartered Accountants



- Acquired Canadian Corporate and Personal Tax and clients' reviews engagement process knowledge in less than a year.
- Exceeded expectations of an Accounting Technician and received promotion to the position of Staff Accountant.
- Achieved excellent efficiency in review engagements rarely requiring overtime during the tax season.

Junior to intermediate accounting roles outside Canada 2003 – 2008

- Working IRFS knowledge (public practice and publicly traded corporations)
- Business systems analysis and re-design.
- Reviews and Notice to Reader engagements (2 years public practice).
- Accounts Payable and Receivable for up to 80 projects simultaneously.
- Value Added Tax (GST) accounting (knowledge of European tax legislation).
- GL, AP, AR and bank reconciliations (inclusive of multi-currency: EUR, GBP, PLN)

EDUCATION

Chartered Professional Accountant

Certified Management Accountant

CMA Alberta

Master of Science in Finance and Investments (partial completion)

University of Economics, 2005

Bachelor of Science in Finance and Banking

School of Banking, 2003

Information Technology and Applied Electronics Diploma

##, 1998

ERP Systems and IT packages utilized:

- Acumatica ERP
- Sage 300 (Timberline)
- MS Dynamics (Great Plains and Solomon) with FRx
- SAP
- Infor Visual
- WorthIT (asset management)
- Share Point
- MS Office (Excel – Expert, Access – Advanced, Word – Advanced, Outlook – Advanced)

DyNexus Recruiting & Staffing

DyNexusGroup.com

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HOBBIES AND INTERESTS

For times where I can share my knowledge and experience with others for free, I volunteer as a mentor in a business incubator.