

# Contractor: WWPCTTIO

## PROFESSIONAL SUMMARY

Innovative, performance-driven, and highly creative professional, with solid academic foundation and comprehensive years of experience in overall aspects of organizational operations, controls, and management.

Committed and dynamic; a team player focused on goals with leadership in diverse areas complemented with proven success leveraging accounting and systems implementations practices across small, medium, and large enterprises within rapidly changing requirements in industries such as Construction and Engineering (Civil, Environmental, Geotechnical, Infrastructure, Oil & Gas, etc.), Technology, Services Providers, Manufacturing and Distributions environments.

Passionate about helping people and organizations in streamlining processes, creating structure, and alignment to bring balance and quality of life at work and consequently at home.

Skilled at coaching, mentoring team members, problem solving, and identifying resource requirements to improve efficiency, productivity, reducing costs toward successful attainment of goals. Bilingual in English, and Portuguese.

## AREAS OF EXPERTISE

- Problem Solving, critical thinking, decision making, creativity.
- Business Process Mapping.
- Project Management.
- Leadership, Training, and Team Builder.
- Strategic Vision and Tactical Execution.
- Communication and Coordination.
- Time Management

## MAIN EDUCATION & CERTIFICATIONS

Six Sigma  
Financial Management  
Networks and Telecommunications  
E-Commerce/Electronic Commerce  
Data Processing and Development

\*Additional certifications below.



## Systems WORK EXPERIENCE

**XXXXX**

**Director/Consultant Oct 2023-Actual** Assisting and helping people and organizations looking to become more efficient and effective in their daily tasks. Streamlining process, connecting teams, blending different personalities, minimizing time spent, maximizing productivity, increasing results to achieve their goals.

- Business Process Mapping.
- ERP Systems Implementation, Training & Support.
- Accounting Consulting and Services.

**XXXXX**

**ERP Implementation Lead Consultant and Project Manager Oct 2021 – Aug 2023** Managed Sage Intacct implementations (core and add-ons) to achieve organization and customer business objectives to ensure maximum system performance, by providing purpose, direction, and motivation.

- Established, maintained, and managed entire project lifecycle (WBS – Work Breakdown Structure), setting quality and performance standards and assessing risks in both ends.
- Led the customer project team to convert the business requirements to system designed specifications to leverage maximum system capacity for future growth to ensure efficiency.
- Trained customer project team to operate the system.
- Recognized and addressed gaps to upper-level management to act and conduct in the best interest of the organization.
- Established and maintained relationships with relevant client stakeholders, providing weekly project status and changes.
- Developed User Acceptance Test (UAT).
- Configured system to accomplish client business requirements.
- Mentored and coached internal team in processes and procedures creation minimizing risk, to improve methodology and performance, and to retain new team members reducing the turnover.

**XXXXX**

**Accounting Manager Nov 2020 – Sep 2021** Managed and oversaw accounting and operation team improvement, implementing corrective actions in internal process and procedures increasing job/projects results.

- Reviewed, documented, implemented and communicated the enforcement of correct and appropriate accounting policies, procedures, and internal controls.
- Mentored and trained staff in daily operations such as accounts payable, receivable, G/L, payroll including timesheet entries, budgeting, cash forecasting, revenue and expenditure allocations and variance analysis, month-end, year-end.
- Provided assistance to external audits, acting as a point of contact for audit documentation including financials and so forth.
- Jobs/projects control and management; cost, revenue recognition, inter-entity transactions, WIP, transfers, clean-up, and close-out.

**XXXXX**

**Accounting and Implementation Consultant Mar 2019 – Sep 2021** Designed, modelled, executed, monitored business process mapping in diverse areas increasing productivity, employee and client satisfaction, decreasing costs and optimizing processes.

- Provided client assistance to implement third-parties systems.
- Provided support and leadership to drive overall team performance goals.
- Designed, modelled, executed, monitored business process mapping (BPM).
- Performed regular analysis preventing impact in month-end, year-end and audit processes.
- Maintained and performed input in accounting systems on an everyday basis.

**XXXXX**

**Project Accountant/Billing Coordinator Jan 2019 – Feb 2020** Supported invoice preparation for internal and external billing purposes. Planned, supervised and analyzed billing and collection activities. Supervised customer billing services to ensure internal procedures, complaints and issues are accomplished and resolved. Partnered with operations for the last (review and signoff) stage of the billing process and project delivery.

- Job/project setup, analysis, control, and management.
- Monthly reconciliations to ensure all projects costs (equipment, materials, supplies, miscellaneous, etc.) were processed.
- Reviewed and verified accuracy of billing supporting documentation as required, including requested expense documentation, unit entry and unit reconciliations as prepared by supporting staff. ▪ Provided project upper-level management assistance with timely financial reports, invoice drafts for review and approval.
- Assisting controller regarding billing and project management.

## **Additional but not limited experience**

Accountant | XXXXX (Contract), Apr 2018 – Dec 2018  
Accountant Office Manager | XXXXX (Contract), Jul 2017 – Mar 2018  
Senior Accountant | XXXXX (Part-time), Aug 2016 – Jun 2017  
Accounting Manager/Team Leader | XXXXX Feb 2013 – May 2016  
Accounting Team Leader | XXXXX May 2012 – Jan 2013  
Accounts Payable Team Leader | XXXXX Feb 2007 – Mar 2012

## **International Experience**

EUA – Participation of sales meeting in La Porte, Indiana  
CANADA – ILAC English Course in Vancouver

## **OTHER CERTIFICATIONS**

- Leadership
- Soft Skills
- Leadership and Management – EQQ5
- Accountant for non-accountants
- Accounting Assistant
- Finance Administration
- COMEX (Export Risk Management)
- RM VITAE (Human Resources Management) – TOTVS
- RM VITAE (Safety and Occupational Medicine) – TOTVS
- Indigenous Canada
- Privacy and Information Sharing – BC Ministry of Finance
- QuickBooks ProAdvisor
- Hardware
- Human Resources Administration
- Linux 1, 2, 3, 4
- MS Windows NT 4.0
- ASP – Active Server Pages
- Wireless

## **Sage Intacct Certifications**

- SHRCA – Sage HR & Payroll Employee Course
- SHRCA – Sage HR & Payroll integration using PayFlow
- Sage Brand Introduction for Partners
- Sage Intacct – Adding Data Using Imports
- Sage Intacct – Advanced Report & Insights
- Sage Intacct – American Express ACH and Vendor Payments
- Sage Intacct – Automating Processes with Smart Events
- Sage Intacct – Automating Subscription Billing and Revenue Recognition with Contracts
- Sage Intacct – Automating Taxes with Sage Intacct
- Sage Intacct – Billing Construction Contracts as Orders in Sage Intacct Construction
- SPCA - Sage Payroll – Getting Started with Sage
- Sage Intacct – Configuring Fixed Assets
- Sage Intacct – Configuring Global Consolidations of Accounts
- Sage Intacct – Reporting with an Alternate Chart
  - Sage Intacct – Configuring Inventory
  - Sage Intacct – Configuring Prepays
- Sage Intacct – Construction Demo Environment Overview
- CRE – Sage Construction Industry Assessment Payroll
- Sage Intacct – Managing Multiple-element Arrangement Allocations in Contracts
- Sage Intacct – Managing Purchase Orders and Subcontracts in Sage Intacct Construction.
- Sage Intacct – Managing Users, Roles, and Permissions
- Sage Intacct – Non-profit Financial Reporting and Dashboards
- Sage Intacct – Printing 1099 Reports and Forms
- Sage Intacct – Provisioning Companies for SIAP Partners
- Sage Intacct – Provisioning Companies for VAR Partners
- Sage Intacct – Recognizing Expenses in Contracts
- Sage Intacct – Release Training Videos – 2021 R4
- Sage Intacct – Release Training Videos – 2022 R1
- Sage Intacct – Running the Business with Contracts
- Sage Intacct – Sage Field Operations Sales and Demo Training
- Sage Intacct – Sage Intacct Implementation Specialist Exam

- Sage Intacct – Construction Payroll Primer
- Sage Intacct – Sage Intacct Implementation Specialist
- Sage Intacct – Construction Project Contracts
- Sage Intacct – Sage Real Estate Sales and Demo Training
- Sage Intacct – Contracts – What comes next – ACP and Beyond
- Sage Intacct – Setting up and using the Accountant Console On-demand
- Sage Intacct – Creating Custom Fields
- Sage Intacct – Tailoring Account Groups for Financial Reports
- Sage Intacct – Creating Projects and Projects Estimates in Sage Intacct Construction
- Sage Intacct – Tracking SaaS Metrics with the Contracts Digital Board Book
- Sage Intacct – Custom Fields
- Sage Intacct – Using Books to Manage Reporting Standards
- Sage Intacct – Creating Reports with Custom report Writer
- Sage Intacct – Using Dimension Structures in Financial Reports
- Sage Intacct – Creating Transactions Definitions
- Sage Intacct – Using, and Maintaining a Multi Entity Shared Environment
- Sage Intacct – Creating, Running, and Reporting on Consolidations
- Sage Intacct – Using, Configuring and Administering Checklists
- Sage Intacct – Customizing Documents with Printed Document Template
- Sage Intacct – Validating Data with Smart Rules
- Sage Intacct – Entering 1099 Reports and Forms
- Sage Intacct – Viewing and Building Visual Insights with Interactive Visual Explorer (IVE)
- Sage Intacct – Financial Report and Dashboards
- Sage Intacct – Fundamentals
- Sage Intacct – Working with Accounts Payable
- Sage Intacct – Getting Started with Sage Intacct
- Sage Intacct – Working with Accounts Receivable
- Sage Intacct – How to Discover Construction business needs
- Sage Intacct – Working with Budgets
- Sage Intacct – Implementation Consultant Certification Assessment
- Sage Intacct – Working with Dynamic Allocations
- Sage Intacct – Implementing Contracts
- Sage Intacct – Working with Multi-Entity Shared Environments
- Sage Intacct – Implementing Projects
- Sage Intacct – Working with Projects
- Sage Intacct – Implementing Sage Intacct Construction Recording (2022 R3)
- Sage Intacct – Working with Sage Intacct Construction: Retainage
- Sage Intacct – Implementing Sage Intacct Construction
- Sage Intacct – Working with Sage Intacct Construction: Change Management
- Sage Intacct – Implementing Sage Intacct
- Sage Intacct – Working with Sage Intacct Planning
- Sage Intacct – Implementing Taxes
- Sage Intacct – Working with Sage Intelligent Time
- Sage Intacct – Implementing Time & Expense
- Sage Intacct – Working with the General Ledger
- Sage Intacct – Integrating with the Advanced CRM Connector
- Sage Intacct – Working with Time & Expenses
- Sage Intacct – Integrating with Web Services
- Sage Intacct – Customer Segmentation Masterclass for Sage Partners
- Sage Intacct – Interactive Custom Report Writer
- Sage Intacct Construction: Projects Contracts (2022 R2 Features)
- Sage Intacct – Introduction to Construction Payroll
- Sage Intacct – Introduction to the Construction Industry
- Sage Intacct – Leveraging Dynamic Allocations
- Sage Intacct – Managing Cash Accounts with Bank Feeds
- Sage Intacct – Managing Evergreen Contracts