**PROFILE SUMMARY**

**FINANCE, OPERATIONS AND BUSINESS DEVELOPMENT EXECUTIVE**

A versatile cross-functional business leader with a deep-rooted passion for analytical problem solving with 14+ years of experience delivering superior P&L results and profit-maximizing solutions across multiple industries. Equally proficient in strategic planning, financial management, business development, performance optimization, forecasting, and budgeting. Outstanding communicator with keen attention to detail and natural ability to forge collaborative executive relationships with internal and external stakeholders. M.A. in Applied Economics.

Operations Management | Process Improvement | P&L Management | Organizational Development | Cross-functional Leadership | Team Building | Change Management | Vendor and Client Relations | Contract Negotiation | Talent Development | Coaching and Mentorship | Problem Solving | Research & Data Analysis

**PROFESSIONAL EXPERIENCE**

**US Acute Care Solutions** | Canton, OH Sep 2018 – Present

A national leader in physician-owned emergency medicine, hospitalist, and observation services, providing care to more than 6 million patients annually at more than 200 locations in 22 states with more than $1B in revenue.

**Senior Director, Corporate Financial Planning and Analysis** | Canton, OH/Dallas, TX

Reporting to the CFO, recruited to spearhead budgeting, forecasting and monthly business updates including board presentation material. Direct team of 3 responsible for reporting, systems and SG&A expenses exceeding $121M.

* Facilitate development of company’s first bottoms-up budget driving 7% revenue and 18% margin growth
* Partner with cross-functional teams driving results to exceed plan by 1% while delivering 3% expense savings

**Treasury Wine Estates** | Melbourne, Australia/Napa, CA Oct 2014 – Sep 2018

World's largest pure-play winemaking and supply company with over 3,400 employees, 14,000 hectares of vineyards, 70 plus wine brands in over 70 countries and over 34.6M 9LE cases of wine sales annually.

**Division Finance Director - West, Pacific NW, Central, and SE Divisions** | Plano, TX | Nov 2016 – Sep 2018

Recruited to re-partner with previous Vice President of Sales and oversee largest trade channel covering 4 divisions, 27 markets and $600M of sales with the nation’s leading wine and spirits distributor. Reporting to CFO, fostered a national team of 4 managers and 3 analysts responsible for discretionary expense budgets exceeding $152M.

* Achieved annual operating plan objectives delivering 26% revenue growth and $16M of cost savings
* Orchestrated bottoms up annual planning process resulting in 12% revenue and 27% margin growth
* Revamped pricing strategy for 80% of brands driving business resulting in +15% margin expansion
* Instituted value-based decision and monthly evaluation processes boosting revenues 4% and margins 17%
* Negotiated pricing and multiparty investment resulting in $4.6M commercial project to exceed forecasted results
* Integrated industry 1st direct and hybrid distribution model changes in 12 markets driving 10% margin growth
* Reduced billing exceptions by 40% meeting compliance and service level agreement commitments
* Delivered multiple training exercises and educational presentations to local and international teams
* Mentored several team members who received nominations and recognition for their contributions

**Division Finance Director - Central US and Latin American Divisions** | Plano, TX | Oct 2014 – Aug 2015

Recruited to become finance executive and sales partner for $160M business unit covering 16 states and Latin America. Reporting to the Vice President of Commercial Finance, cultivated a manager and analyst responsible for pricing, margin management, ROI, accounts payable and overhead budgets more than $33M annually.

* Partnered with field teams to deliver volume expectations and exceed profit growth targets by more than 6%
* Worked cross-functionally to implement price increases across 15 key items driving over 10% margin growth
* Focused investment and programming spend in Latin American region resulting in 72% margin growth annually
* Improved a loosely managed $3.7M financial project finalizing it three months early within budget and guidelines
* Established local marketing fund rules-of-engagement ensuring compliance and effective investment spend

**Saputo Dairy Foods** | Montreal, Canada/Dallas, TX May 2010 – Nov 2016

One of the largest producers, marketers, and distributors of extended shelf-life dairy products including creamer, ice cream mix, whipping cream, iced coffee, and cultured products, such as sour cream and cottage cheese.

**Director, Sales Operations** | Dallas, TX | Aug 2015 – Nov 2016

Recruited to return as a business executive for $560M foodservice distribution sales channel. Reporting to Vice President of Sales Administration, accountable for customer activation and commercialization with product management, supply chain, operations, research and development, finance, field sales, and customer service.

* Pioneered turnaround of profit performance of (7.5)% to budget upon accepting the position to finish at 6.4%
* Coordinated development of bottoms-up annual operating plan driving 4% volume and 7% margin growth
* Developed 3-year strategic growth plan outlining 3% volume and 4% profit CAGR vs industry trends of 2.5%
* Negotiated 3-year extension of an exclusive supplier agreement with a leading foodservice distribution company
* Designed an innovative broker incentive program and validation process aimed at driving $11M margin growth
* Launched several new product development items including non-dairy flavored creamer and iced coffee

**Senior Manager, Commercial Finance** | Dallas, TX | Sep 2013 – Oct 2014

Promoted to revenue management lead for $500M foodservice distribution sales channel. Reporting to Senior Director of Revenue Management, supervised 3 financial analysts in charge of monthly pricing process, new business evaluation, end-to-end customer financial ownership and providing forward-thinking business insights.

* Executed 1st exclusive supplier agreement driving 25% revenue growth with consistent pricing and margins
* Implemented several price adjustments exceeding cost expectations resulting in margin expansion
* Streamlined new business evaluation process resulting in accelerated speed to market and competitive pricing
* Institutionalized trended cause-of-change model quantifying volume, rate and mix impacts on profitability results
* Restructured third-party broker incentive plan aimed at driving over 10% volume and 9% margin growth
* Formulated detailed account and channel pricing guidance identifying margin expansion risks and opportunities

**Manager, Product Management Finance** | Dallas, TX | Mar 2012 – Sep 2013

Promoted to an expanded role identifying performance improvement opportunities for $1.7 billion business unit. Reporting to the Director, Product Management Finance, guided 2 financial analysts in evaluating revenue, price, cost, and margin growth opportunities while collaborating with cross-functional teams to implement key initiatives.

* Earned company’s inaugural CFO award for leading actionable and sustainable financial analytics and insights
* Engineered company’s 1st national price list representing $60M of revenue driving over 10% volume growth
* Chartered 1st customer level P&L identifying “true customer profitability” capturing non-system based metrics

**Senior Financial Analyst, Product Management Finance** | Dallas, TX | May 2010 – Mar 2012

Hired as an original member of newly developed product management team. Reporting to Director, Product Management Finance, charged with identifying opportunities to drive growth and improve category performance.

* Modeled strategic optimization project with largest customer representing 20% of volume and $240M of revenue
* Integrated detailed templates for monthly performance results, annual operating plans, and quarterly forecasts
* Instituted report detailing monthly price and cost movements quantifying price realization and profitability impact

**J. Stowe & Co. | Senior Consultant** | Richardson, Texas | Jun 2009 – Feb 2010

**Analysis Group | Analyst** | Dallas, TX | Mar 2007 – Mar 2009

**Navigant Consulting | Consultant** | Dallas, TX | Dec 2005 – Mar 2007

**EDUCATION**

Master of Arts, Applied Economics | Southern Methodist University | Dallas, TX

Bachelor of Science, Economics with Financial Applications | Southern Methodist University | Dallas, TX

**CERTIFICATES**

Graduate Marketing Certificate | Southern Methodist University | Dallas, TX