

M&A and Transformation Executive

Define and execute M&A and transformation strategies to drive growth and business value

Involved in M&A transactions with total deal value of \$20 Billion, and led 50 Transformations with \$100 million business impact. Managed 30 enterprise wide deployments.

Influential, forward-thinking leader with deep experience in mergers and acquisitions (M&A), business transformations and program management. Solid history of providing management consulting services to diverse companies across multiple industries. Proven success managing large programs with multiple parallel projects to optimize organizational synergies and achieve desired outcomes. Collaborative problem solver proficient in driving organizational change management (OCM) activities and tracking changing business models impacted by disruptive innovations.

Areas of Expertise:

M&A Strategy & Execution | M&A Integrations & Divestitures | Business Strategy & Execution

Business Transformation | Digital Transformation | Corporate Financials | Program & Project Management

Change Management | ERP Implementations | Global Business Services

Experience Summary

Business Transformation:

- Led transformations at 50 companies, delivering hundreds of millions of dollars in business impact.
- Owned business strategy and execution, digital transformation, program management, project management, change management and global business services.
- Managed corporate financials, supply chain, manufacturing and HR.
- Served in diverse roles, including program director, program manager, project manager, business and IT leader.
- Transformed customer and employee experience, operations and business model. Implemented an agile architecture where digital assets could be securely leveraged, reused, combined and shared.
- Managed changing business models impacted by key technologies, including social, mobile, analytics, embedded devices, cloud, big data, automation, IoT, 3D printing, robots and drones, augmented reality and personalization.

Mergers & Acquisitions:

- Focused on M&A to deliver deal value; involved in multiple M&A integrations and divestitures, with a total deal value of \$20B.
- Evaluated corporate financial statements and performed financial modeling to support deals.
- Led M&A deal team, including lawyers, accountants and consultants to deliver deal value. Managed Integration Management Office (IMO) and Separation Management Office (SMO). Drove multiple parallel projects.
- Worked on these M&A transactions:
 - Jacobs ECR / Worley Parsons (\$3.2B, 2019)
 - Jacobs / CH2M (\$3.3B, 2018 - 2019)
 - GE Appliances / Haier (\$5.6B, 2015)
 - Real Page / Yield Tech (\$10M, 2015)
 - ITW / Signode / Carlyle Group (\$3.2B, 2014)
 - Ingersoll Rand / Hussmann (\$1B, 2011)
 - AMLI / Morgan Stanley (\$2.1B, 2006)
 - ACCO Brands / GBC (\$1B, 2005)
 - Fortune Brands / ACCO Brands (\$1B, 2005)

Experience Summary (Continued)

Program Management:

- Worked as program director or program manager for several large programs, managing multiple related projects to optimize organizational synergies and achieve desired outcomes.
- Partnered with project managers, business leaders, technology leaders and Program Management Office, coordinating organizational goals, resources, budgets, timelines, dependencies and deliverables.
- Managed Program Management Office (PMO), including establishing project execution standards (deliverables, templates) and efficient project control systems for managing multiple parallel projects.
- Functioned as project manager for multiple large complex projects, achieving project goals within defined cost, scope, schedule and quality. Managed complete lifecycle of projects, with waterfall and agile methodologies.
- Managed organizational change management (OCM), including change management strategy, communications strategy, organizational impact analysis, stakeholder assessment, future state organizational design, role mapping, communication plan, business readiness plan, training plan, knowledge transfer plan, cutover plan, business contingency plans, go / no-go assessment, hyper-care plan and support plan.
- Extensive experience with Smartsheet, Microsoft Projects and JIRA.

People Management:

- Managed engagement teams of 10 to 500 people, including direct reports and indirect reports.
- Coordinated with internal and external stakeholders, including C-level executives, senior leaders, middle management and individual contributors; practiced consistent communications on all channels
- Promoted healthy work environment; served as a mentor to junior team members to understand what they want and align their personal goals with the project and company goals

Technology Platforms:

- Oracle E-Business Suite: Managed 7 implementations of Oracle E-Business Suite R12 (Financials, Manufacturing, Supply Chain, HR); was part of 19 Oracle EBS R11i implementations.
- Business Intelligence: Implemented Oracle OBIEE and OBIA (Financials, Supply Chain) for various clients.
- Salesforce: Managed Salesforce CRM implementations, including integration of Salesforce with Oracle ERP.
- Oracle EPM: Managed implementation of Hyperion Financial Management (HFM).
- Concur: Managed multiple implementations of Concur, including integration with Oracle EBS R12.
- Workday: Managed implementation of Workday HR, including integration with ERP Financials.
- Other Platforms: Hexagon EcoSys Projects, Oracle NetSuite, Microsoft Dynamics 365
- Microsoft Azure: Managed implementation of Office 365, including SharePoint, One Drive and Outlook.
- Amazon AWS: Used AWS platform for developing custom application.
- ITIL Service Management: Coordinated rollout of Service Management solution using ServiceNow.

Healthcare Experience:

- Panmedical: Cofounder & CTO; Telehealth startup; led development of Telemedicine and EHR platform
- Abbott Labs: Led development of platform for international pricing of all drugs
- Cardinal Health (Pyxis): Coordinated manufacturing for a medical equipment manufacturer
- Sanford Health (CPC): Coordinated financials for a major hospital system
- Medela: Coordinated financial platform for a medical equipment manufacturer
- Panhealth: Setup a doctor's clinic, coordinated operations; assisted with Divestiture

Experience Details

PANVISAGE INC, Los Angeles, CA

2020 - Present

M&A, Transformation and Program Management

Consult with clients on projects related to M&A and Transformation to drive growth and business value. Advise on business and operations strategy, value creation and transformation. Provide program management and change management for critical initiatives.

- **Equinix, M&A and Transformation, Senior Program Manager**, San Francisco, CA, 2020
Supported the Integration Management Office (IMO) for M&A Integration and Transformation of Equinix's acquisition of Packet, Inc. (2020, \$335 Million). Worked with senior management and key stakeholders for activities related to Integration and Transformation, including Go-To-Market (GTM) Strategy for expanding markets to deploy seamless hybrid multi-cloud infrastructure.

JACOBS ENGINEERING GROUP, Pasadena, CA; Dallas, TX

2015 - 2019

- **M&A Divestiture - Program Director**, Dallas, TX; Houston, TX, 2019
Served as member of Jacobs' M&A and Transformation Group. Worked on divestiture of Jacobs Energy Chemicals & Resources (ECR) division to Worley Parsons (deal value of \$3.2B, program budget \$75M). Managed several projects for program. Platform included Oracle E-Business Suite R12, Salesforce, Concur, Hyperion, EcoSys and BI. Managed internal and external resources for several projects to replicate the corporate platform.
- **M&A Integration - Program Director**, Dallas, TX; Denver, CO, 2018 - 2019
Operated as part of Jacobs' M&A and Transformation Group. Worked on integration of CH2M Hill Companies into Jacobs (deal value of \$3.3B, program budget \$30M). Integrated 80% of CH2M business into Jacobs in 6 months; remaining 32 countries integrated in 2019. Platform included Oracle E-Business Suite R12, Salesforce, Concur, Hyperion, EcoSys and BI. Managed work of internal team and vendor implementation team to transition seller to buyers corporate platform on Oracle EBS R12 and associated ecosystem of applications.
- **Transformation - Program Director**, Pasadena, CA, 2015 - 2017
Served as part of Jacobs' Enterprise Applications Group. Managed Oracle E-Business Suite R12 based transformation of finance back office (program budget of \$35M). Ecosystem included Oracle EBS R12 Finance and HR, Oracle EPM (Hyperion HFM), Business Intelligence (OBIEE, OBIA), Salesforce, Concur and ServiceNow. Managed work of internal and external team to implement Oracle EBS R12 and ecosystem (upgrade from Oracle EBS 11i).

PANMEDICAL, INC, Los Angeles, CA

2015 - 2016

Cofounder, CTO:

- Panmedical was a startup focused on Telehealth Services
- Led development of the Telemedicine platform, workflow, and Electronic Health Record (EHR)
- Platform Tech Stack included WordPress, Divi, HTML5, JavaScript, LAMP Stack (Linux, Apache, MySQL, PHP), Integrations with PayPal & PayU Payment Gateway, BASH SMS, Mailgun Email, WebRTC API for Video, etc.

PANVISAGE CORPORATION, Los Angeles, CA; Chicago, IL

2004 - 2015

Management Consultant; Multiple Clients and Projects (See List Below)

- **GE APPLIANCES & HAIER, M&A Divestiture - Senior Program Manager**, Louisville, KY, 2015
Facilitated sale of GE's Appliances Division to Haier (deal value of \$5.6B, 2015). Advised management on coordinating and managing multiple transformation projects to complete in time to prepare company for sale. Ecosystem included Oracle EBS R12 (Finance, Manufacturing, Supply Chain, HR) and other applications. Managed multiple in-flight projects that were part of the program.

PANVISAGE CORPORATION (Continued)

- **INGERSOLL RAND & HUSSMANN CORP, M&A Divestiture - Project Manager**, St Louis, MO, 2014 - 2015
Facilitated divestiture of Hussmann Corporation from Ingersoll Rand (deal value of \$1B, 2015). Led replication of corporate platform, data center and business processes for new company. Ecosystem included Oracle EBS R12 (Finance, Manufacturing, Supply Chain, HR) and other applications. Managed multiple projects, working with internal and external team to complete projects on-time and within budget.
- **ITW, SIGNODE & CARLYLE GROUP, M&A Divestiture - Program Manager**, Glenview, IL, 2013 - 2014
Worked on divestiture of Signode division from Illinois Tool Works (ITW) to form new company. Participated in managing sale of new company to PE firm Carlyle Group (\$3.2B, 2014). Ecosystem included many applications like Oracle Hyperion, Microsoft Great Plains and Dynamics CRM, Workday, Concur, Fleet Management, Spend Analytics, Transportation Management and Office 365. Managed multiple projects, working with internal and external team, including managing dependencies across project workstreams.
- **REAL PAGE & YIELD TECH, M&A Integration & New Ventures - Program Manager**, Dallas, TX; Chicago, IL, 2013
Managed integration and new ventures for Real Page after sale of Yield Technologies to Real Page Inc. (deal value of \$10M). Led multiple projects. Enabled company to achieve and exceed deal value with 'new ventures' portfolio. Hired multiple resources and setup several product development teams, and delivered new products.
- **HYATT HOTELS, Transformation - Financial Systems Consultant**, Chicago, IL, 2012 – 2013
Served as key advisor to senior leadership team (CFO, CIO) during ERP-based finance transformation of Hyatt's back-office systems. Coordinated project activities with Oracle and Wipro. Platform included Oracle E-Business Suite R12, Oracle EPM (Hyperion) and associated ecosystem.
- **ABBOTT LABORATORIES, Transformation - Project Manager**, Northbrook, IL, 2010 - 2012
Collaborated with corporate finance to implement global transfer pricing system to create 'tax-efficient supply chain' that would generate target profits in each country of operation. Platform included SAP, Oracle Hyperion Integrated Operational Planning (IOP) and associated ecosystem. Managed internal and external teams to deliver key project milestones.
- **AMLI & MORGAN STANLEY, M&A Privatization - Program Manager**, Chicago, IL, 2010 - 2011
Drove finance platform upgrade for AMLI Residential, following acquisition of Chicago REIT by Morgan Stanley to take company private (deal value of \$2.1B). Ecosystem included Oracle EBS R12 Financials and other applications. Managed a fast paced upgrade, working with vendor and internal team to meet management expectations.
- **ZEBRA TECHNOLOGIES, Transformation - Integration Lead**, Lincolnshire, IL, 2009 - 2010
Served as Integration Lead during ERP-based transformation of Zebra's back-office systems and outsourcing of contract manufacturing to Jabil Circuits (China). Platform included Oracle E-Business Suite R12, Business Intelligence, Oracle EPM (Hyperion) and associated ecosystem. Coordinated integration of data and transactions across multiple platforms in the ecosystem.
- **TRAVEL CLICK INC, Transformation - Project Manager**, Schaumburg, IL, 2008 - 2009
Worked as project manager for Financial Systems in partnership with corporate finance. Spearheaded ERP-based transformation of back-office systems and data center consolidation. Platform included Oracle E-Business Suite R12, Business Intelligence, Salesforce and associated ecosystem. Managed multiple parallel projects.
- **ALBERTSONS, Transformation - Procurement Business Lead**, Boise, ID, 2007
Served as procurement business lead for Oracle EBS-based transformation of back-office systems for Albertsons grocery chain, working with Cap Gemini.
- **KAPLAN FINANCIALS, Transformation – Order-to-Cash Business Lead**, Chicago, IL, 2006
Served as order-to-cash business lead for Oracle EBS-based transformation of back-office systems for Kaplan Financials, working with Oracle Consulting.

PANVISAGE CORPORATION (Continued)

- **ACCO BRANDS & GBC, M&A Integration - Integration Lead**, Lincolnshire, IL; Northbrook, IL, 2005
Facilitated integration of ACCO Brands with GBC, to form combined office products giant (deal value \$1B). Led integration effort and facilitated setup of platform and processes. Streamlined supply chain operations to achieve significant savings.
- **FORTUNE BRANDS & ACCO BRANDS, M&A Divestiture - Divestiture Lead**, Lincolnshire, IL, 2004 - 2005
Oversaw divestiture of office products division from 'Fortune Brands' to form new company called 'ACCO Brands' (deal value \$1B). Facilitated setup of platform and processes for manufacturing and distribution for new company.
- **UTSTARCOM (divested from 3M), Order to Cash Lead**, Schaumburg, IL, 2004
Served as an Order to Cash Business Lead Consultant for an Oracle EBS based transformation of back-office systems; managed functional and technical deliverables for the OTC workstream.
- **JM FAMIY ENTERPRISES, Supply Chain Business Lead**, Deerfield Beach, FL, 2004
Served as a Supply Chain Business Lead Consultant for an Oracle EBS based transformation of back-office systems for JM Family Enterprises, a major Toyota dealership chain in southeast USA; managed functional and technical deliverables for the SCM workstream.
- **DESTACO, Project Manager, Manufacturing**, Detroit, MI, 2004
Served as a Manufacturing Project Manager for an Oracle EBS based transformation of back-office systems for Destaco, an auto-parts manufacturing company (major supplier of Ford & GM).
- **MEDELA, Electronic Data Interchange (EDI) Lead**, McHenry, IL, 2004
Served as an Electronic Data Interchange (EDI) Lead Consultant for an Oracle EBS based transformation of back-office systems for Medela, Inc.

ORACLE CORPORATION, Chicago, IL, Houston, TX

1998 - 2004

Senior Principal Consultant; Multiple Clients and Projects

Part of Oracle Consulting; involved in ERP based business transformations. Worked at 14 clients of Oracle across the US, in financials, supply chain, manufacturing and human resources workstreams (see projects below).

- **EATON CORPORATION, Manufacturing Business Lead**, Kalamazoo, MI, 2003
Served as a Manufacturing Business Lead Consultant for an Oracle EBS based transformation of back-office systems for Eaton Corporation, a major auto-parts manufacturer.
- **PNC FINANCIALS, Finance Business Lead**, Washington, DC, 2003
Served as a Finance Business Lead Consultant for an Oracle EBS based transformation of back-office systems for Riggs Bank, which is now part of PNC Financials.
- **SINCLAIR BROADCASTING, Finance Business Lead**, Baltimore, MD, 2003
Served as a Finance Business Lead Consultant for an Oracle EBS based transformation of back-office systems for Sinclair Broadcasting Corporation.
- **HORMEL FOODS, Procurement Business Lead**, Austin, MN, 2003
Served as a Procurement Business Lead Consultant for integration of back-office systems for Hormel Foods, with a company they bought.
- **FORD MOTOR COMPANY, Global Procurement Architect**, Livonia, MI, 2003
Served as a Global Procurement Architect for an Oracle EBS based transformation of back-office systems for Ford Motor Company.
- **MCDONALDS CORPORATION, Project Manager, Logistics**, Oakbrook, IL, 2001-02
Served as a Project Manager for Integrated Logistics for an Oracle EBS based transformation of back-office systems for McDonalds Corporation.

ORACLE CORPORATION (Continued)

- **ARAMARK, Finance Business Lead**, Philadelphia, PA, 2001
Served as a Finance Lead Consultant for an Oracle EBS based transformation of back-office systems for Aramark, a major services company.
- **EMC, Supply Chain Lead**, Framingham, MA, 2001
Served as a Supply Chain Lead Consultant for an Oracle EBS based transformation of back-office systems for EMC, a major computer hardware company.
- **CARDINAL HEALTH, Manufacturing Business Lead**, San Diego, CA, 2001
Served as a Manufacturing Business Lead Consultant for an Oracle EBS based transformation of back-office systems for Pyxis Corp, which is now part of Cardinal Health.
- **SANFORD HEALTH, Finance Business Lead**, Sioux Falls, SD, 2001
Served as a Finance Business Lead Consultant for an Oracle EBS based transformation of back-office systems for Central Plains Clinic, which is now part of Sanford Health.
- **FIRESTONE, Finance Reporting Lead**, Schaumburg, IL, 2000
Served as a Finance Reporting Lead Consultant for an Oracle Technology Stack based transformation of back-office systems for Firestone.
- **CHICAGO PUBLIC SCHOOL, Technical Lead**, Chicago, IL, 1999-2000
Served as a Technical Lead Consultant for an Oracle EBS based transformation of back-office systems for Chicago Public Schools, a major public-school system.
- **ENCYCLOPEDIA BRITANNICA, Technical Lead**, Chicago, IL, 1998
Served as a Technical Lead Consultant for an Oracle Technology Stack based transformation of back-office systems for Encyclopedia Britannica.
- **AIR LIQUID AMERICA, Technical Lead**, Houston, TX, 1998
Served as a Finance Technical Lead Consultant for an Oracle EBS based transformation of back-office systems for Air Liquide America, Inc.

Education

- **Financial Modeling & Valuation Analyst (FMVA) Certification**, Corporate Finance Institute, Vancouver, BC, in progress, expected completion 2020 (M&A Financial Modeling)
- **Chicago Management Institute (CMI)**, University of Chicago Booth School of Business, Chicago, IL
- **Bachelor of Engineering**, Electrical & Electronics, Birla Institute of Technology, India