

Summary of Qualifications

Allan is a Business Analyst with more than 17 years experience in full life cycle end-to-end project implementations. He has worked with clients in the healthcare and banking industries as well as the Federal and State governments. Allan is experienced at compiling business requirements and translating them into integrated systems and architectural solutions. Allan has a proven management background with over 20 years of accounting industry experience.

Professional Experience

Lawson Budgeting and Planning (LBP)

9.0.0 - 9.0.1

HealthCare
Banking Industry
Local Government
Retail
Education

- **Subject Matter Expert for Budgeting and Planning Application:** Specialize in delivering advanced budgeting and forecasting solutions with an emphasis on modeling, productivity, position control, and workforce planning. Provide design solutions for Lawson's larger delivery projects or projects more complex in nature and require more senior leadership.

Collateral responsibilities have included; providing support for Presales Initiatives, Project Scoping, Project Planning and Risk Assessment, as well as Strategic Application Architectural Design, evaluate business needs including business process re-engineering and technology to determine next generation business initiatives.

Key Implementation Projects Include:

- City Government that annually budgets for 48 months each budget cycle. The project included Financials and Activities with the activities budget programmatically updating and populating the annual operating budget.
- Large Retail organization with department and outlet stores throughout the United States. Developed a three year rolling forecast that uses shifting & indexing model functionality to build and populate years 2 -3 of the forecast model.
- Federal Bank in the mid west with approximately \$85 billion in deposits, serving the needs of member housing finance institutions located in Illinois and Wisconsin.
- Large Midwest hospital that translates Position Control FTE budgets into Productive and Non Productive FTE and Salary based on statistical volume levels.
- Mental Health Agency in Midwest receiving Federal and State funding. The design included State reporting benchmarks, revenue based on program types, funding sources and time study analysis.
- Mid-sized hospital in Midwest. Designed the approach to encompass Strategic Planning, as well as Flex/Volume Budgets in LBP. LBP became the source system for calculating and storing Productivity and Benchmark Statistics on a monthly basis. LBP produced a volume based budget used in monthly variance reports across the entire organization.
- Large hospital in Western United States with 1100 licensed beds and multiple hospitals. The approach included Productivity and Nursing Grids used in conjunction with Workforce and Position Control.
- Nationally recognized children's hospital with approximately 800 licensed beds and 8,000 employees. The design included Budget to Target comparisons in LBP.
- Academic health center in central Virginia with 779 licensed beds and budgeted staff approximating 7,000 employees. The project encompassed 6 companies and 4 payroll systems.
- Mid-sized regional medical health system in the southeast with 3 hospitals and 17 companies
- Third largest county government in North Carolina in terms of geographic size, economic tax base, and budgeted expenditures.



Lawson Financials 8.0 – 9.0

Federal Government
Health Care

- **Post Live Support Analyst:** Enhanced data integrity for inbound and outbound interfaces by identifying process flow improvements; implemented payroll and general ledger reconciliation procedures; developed Fact Tables and Multi-Dimensional data object cubes using Lawson PR and HR tables in a Micro Strategy Data Warehouse.
- **Implementation Consultant:** Implemented General Ledger, Report Writer, and Flexible Budget .

Document Management

Banking Industry

- **Project Manager and Business Lead for loan processing and document management system:** Worked closely with project stakeholders and business users to drive the creation of an automated loan processing and document management system. Quickly gained credibility with senior business unit personnel by demonstrating and conveying a high-level conceptual understanding of customer, technical and business applications impacted with the change process. Functioned as the primary liaison between business, technical development, and external vendor teams. Responsibilities include requirements analysis, issue resolution coordination, project communications, standards management, risk mitigation, user acceptance testing, change management activities and deployment preparation.

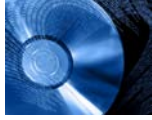
Custom Development

State Government

- **Project Lead for Transitional Assistance for Needy Families (TANF), Job Opportunity and Basic Skills (JOBS), and Aid for Children and Families (ACF) payment subsidy systems:** Provided leadership across business groups, both cross-functional and global. Led efforts of technical teams to develop logical data model and deliver technical solutions to clients. Partnered closely with business client to evaluate and determine business processes. Working with an overview of strategic direction to determine alternatives and solutions that extend beyond existing boundaries.

Key Projects Include:

- *First to Work and Employment & Training Program*
Developed and implemented employment programs for the TANF and United States Department of Agriculture (USDA) Food Stamps programs. The application enables recipients and applicants to become self-sufficient by linking them with resources and skills. The application provides clinical assessments, case management and follow up, treatment and treatment linkages as well as an array of services designed to address the individual's self-sufficiency barriers.
- *Child Care Subsidy Program*
Developed and implemented a federally funded ACF childcare assistance program. The program assists parents with the cost of childcare. Subsidies are used to pay tuition costs for early childhood programs. The application calculates and pays subsidies based on qualifying activities including eligibility determination based on net monthly family income and household size.
- *Professional Development Registry*
Developed and implemented a statewide system to recognize and document credentials and professional qualifications of practitioners working in childhood care and education settings.
- *Childcare Licensing Program*
Developed and implemented a statewide Childcare licensing program. The program promotes the health; safety and welfare of children in regulated community care arrangements. The system tracks quality assurance and consumer protection services for children in licensed children's programs throughout the state for licensed and other payment providers.



QSP (Cedar) Financials

Transportation
 Healthcare
 Manufacturing
 Services

- **Functional Implementation Consultant:** Implemented Enterprise Resource Planning (ERP) systems. Authored system design & build, interface & modification specifications, workflow and business process reengineering documents. Managed data conversion and integration activities. Formulated and executed migration strategies to move data between regions. Supervised User Acceptance Testing and resources. Modules included General Ledger, Account Payable, and Project Accounting.

Skills Summary

Methodologies

- Enterprise System Development Lifecycle (SDLC)
- Enterprise Unified Process (EUP)
- Capability Maturity Modeling (CMM)

Domain Expertise

- Healthcare & Governmental Budgeting
- ERP Financials
- TANF & JOBS Programs
- ACF Reporting
- Childcare Licensing, Subsidy & Welfare

Engagement Experience

- Conceptual & Logical Modeling
- Applications Development
- Quality Assurance Testing
- Data Conversion
- End User Testing
- Deployment & Migration
- Project Team & End User Training
- Project Management
- Documentation

Industry Background

- Chief Financial Officer of a multi-national software development firm with engagements ranging from \$5 to \$30 million (USD)
- Senior Systems Analyst & Project Lead for State and Local Government Project Initiatives
- Job Cost Accountant in a global Architectural firm, responsible for South Pacific and Asian operations
- Tax Accountant in a Certified Public Accounting firm specializing in corporate and partnership taxes

Other Pertinent Credentials

Education

- BS Accounting, University Of North Carolina – Charlotte

Training

- Lawson General Ledger 9.0
- Lawson Report Writer
- Lawson Flexible Budgeting
- Lawson Budget & Planning
- Essbase 9.3.1
- Hyperion Planning 9
- Hyperion Financial Reports
- Hyperion Web Analysis
- COGNOS Impromptu
- COGNOS Hypercubes

Presentations & Publications

- Advanced Modeling Techniques Lawson Users Conference, March 2008
- Lawson User Conference Product Demonstrations, 2009

Other

- Designated as a Lawson Budgeting and Planning Subject Matter Expert (SME) by Lawson