

## **Overview**

A Senior ERP Program / Project Manager with 25+ years in transforming enterprises with underperforming or non-scalable Order Fulfillment, Manufacturing and Supply Chain operations for Manufacturers / Distributors in several industries. Expert at applying and implementing ERP systems and leading digital transformations to ensure the competitiveness of these enterprises. Strong leadership and team building skills with a long track record of successful transformations in complex and high intensity environments.

## **Experience**

02/2019 – Present **NESTELL & ASSOCIATES**

### **Sr. Project Manager Advisor**

- I provide “Practitioner Advice” on ERP rollout strategies considering, business requirements, project constraints, and organizational change challenges
  - Advised on changing processes to align with ERP system vs. software modifications
  - Counseled on how to include tasks of data migration from legacy systems within an ERP implementation
  - Coached on project team building amongst departments and separate company divisions

03/2018 - 01/2019: **M HOLLAND**

### **ERP Program Manager/Project Manager**

- Lead contract terminating strategy and negotiations with the original MS D365 ERP software provider for non-delivery and breach of contract. Mitigated the impact on M Holland and avoided litigation.
- Lead and negotiated engagement contract with new MS D365 ERP software provider resulting in fair and equitable terms for M Holland and the software provider
- Responsible for developing and managing the MS D365 program implementation which included:
  - Program Plan development and oversight
  - Creating and maintaining program budgets
  - Data Migration from three legacy systems
  - Integrations to nine independent software products
  - Integration with a TMS system for supporting 50, 3<sup>rd</sup>. party warehouses
- Responsible for managing all ISV contracts
- Responsible for managing all ISV relationships to create a cohesive and cooperative program team for ensuring the project’s success
- Project was on-time and below budget when I left M Holland

4 / 2013 – 8 / 2017: **KNOWLEDGEPATH CONSULTING, INC.**

### **Project Director / Manager for ERP implementations / Operations Improvements**

**CLIENT PROFILE:** A five location fire suppression / detection contractor, and fire protection / mechanical supply distributor and fabricator company with disparate and paper driven operating system having no scalability for their continued growth.

#### **Challenges:**

Including both distributor and four contractor locations

- 23% - 25% average annual inventory write-off per unknown causes
- No enterprise wide standard processes / procedures causing

#### **Actions Taken:**

Advised / lead executive board, client and software vendor teams through following:

- Blueprinting enterprise for operation assessment, software selection, and implementation
- ERP software evaluation (MS Dynamics, SAP, Epicor) and selection

- delays in intercompany transactions, additional costs and delayed customer services
- Intercompany transactions all paper driven
- Lost sales orders due to excessive back orders, late, and incorrect order shipments
- Unknown project material costs
- Excessive accounting efforts needed to determine project material, labor, and consumables cost for projects
- Manual project, progress and contract billing
- No standard database across company
- ERP software implementation (MS Dynamics)
- Extensive operational and organizational changes throughout enterprise including finance, supply chain, order fulfillment, manufacturing and inventory management
- Applying ERP system to support new operational methods and management controls
- Designing and building entirely new business operating system databases including standards and conventions for its ongoing maintenance
- Designed and implemented new warehouse configurations for inventory, staging and order assembly in all locations
- Training of management and end-users
- "How to" system usage manuals for entire enterprise

#### **Results to Date:**

- Eliminated \$75,000 of obsolete and scrap materials
- Decreased sales order and shipment errors by 30%
- Shortened standard item sales order shipment lead time from 2 ½ days to same day of order received
- Decreased yearly inventory write-off from average of 23% - 25% to 0.4%
- Implemented Cycle Counting to reduce physical inventory requirements from semi-annual to annual
- Reduced physical inventory duration from three days to one
- Reduced purchase order errors by 40%
- Revised costing and inventory valuation methods resulting in accurate item and project level costing
- Reduced A/R invoicing lag time from 3 ½ day average to same as shipment day
- Reduced A/P late payments
- Reduced manufacturing order turnaround time by 40%
- Reduced manufacturing order errors by 20%
- Warehouse capacity increases ranged from 40% to 60% and enabled a one direction flow of material, assembly, and information while applying the new ERP system due to reconfigurations
- Inventory transactions implemented on wireless devices
- Inventory balances and transactions on truck fleet now included
- The newly created database and standards, processes and procedures for supporting supply chain, order fulfillment, inventory management, project and manufacturing orders were implemented at the four remaining locations after the first location went live

**CLIENT PROFILE:** An international manufacturer of automated bakery equipment with 200 end users of multiple disparate systems across three locations requiring ERP selection management and consulting.

#### **Challenges:**

- Two domestic and one Canadian manufacturing location, each using multiple and disparate systems
- Multiple language and currency requirements

No enterprise wide database standards or operations procedures causing:

#### **Actions Taken:**

- Lead client and KPC team to complete the following
- Aggressively executed the Blueprinting and process mapping of three facility's operations
- Defined company specific "secret sauce" process requirements in addition to standard ERP software functions
- Created a Vendor Packet of client's

- Cost overruns
- Intercompany purchase and sales order delays
- Customer order delays and cost overruns
- Parts manufactured to wrong revision levels causing additional costs and delays
- Redundant processes throughout entire enterprise
- Two month window for enterprise assessment and Blueprinting

organization, infrastructure, process and system requirements

- Orchestrated ERP software selection search (MS Dynamics, Net Suite, Epicor)
- Guided client through long list to short list of potential software products and vendors
- Orchestrated software demonstrations
- Enabled client through evaluating and score carding each ERP product and vendor

#### **Results to Date:**

Client successfully selected an ERP system for suited for the entire enterprise

**CLIENT PROFILE:** A surgical products company that developments and manufactures surgical instruments and surgical instrument assemblies challenged with diminishing profits, late customer orders increasing and no infrastructure for anticipated growth.

As a member of this ERP selection and implementation team, my focus was on finance and manufacturing costing.

#### **Challenges:**

- Antiquated software systems that would not support expected 30% – 40% growth
- Costing methods outdated by addition of more complicated molding, insert molding, secondary, and assembly operations
- Current shop floor orders no longer reflecting actual operations or costs
- Overheads no longer being properly applied to work stations / operations, hence distorting product costs
- No Actual Costing methods / tools to manage precious metals for stampings
- No WIP visibility causing stock shortages and over purchases
- Corporate financial structure no longer reflecting actual operation

#### **Actions Taken:**

Lead Finance and Manufacturing team through the design of standards and methods used for:

- Financial structures for Manufacturing and Warehousing Departments
- Work Centers
- Work Stations
- Routes and Bills of Materials
- Manufacturing costs and overheads
- WIP and Warehouse Inventory Management
- Material costing

#### **Results to Date:**

- Client used all newly developed finance, manufacturing, costing, and inventory database and process designs for successfully implementing their new ERP system (MS Dynamics)

**CLIENT PROFILE:** Manufacturer / international distributor of metal fabricated products with simultaneous manufacturing, ERP, and engineering system projects for attempting to improve customer service and reduce costs.

**Challenges:**

- Inventory balances increasing while turns decreasing
- Crippling inventory accuracy
- Continuous late order deliveries
- Losing customers
- Project budgets exceeded
- Project objectives not met
- Uncertain senior management

**Actions Taken:**

- Assessed client's customer demands, order fulfillment processes / system use, and related projects
- Advised and coached senior management
- Aligned projects with business priorities
- Canceled unnecessary and redundant projects
- Designed and implemented Order Fulfillment / Inventory and Control Shop Floor Control processes using existing ERP system
- Implemented barcoding, FIFO inventory, lot tracing to support US Military and UN design standards,
- Project managed all client and 3<sup>rd</sup> party vendors involved in project
- Trained management and end-users

**Results to Date:**

- Average inventory balances reduced 18%, turns continue increasing
- Production throughput increased 23%
- On time delivery rate increased 60% and improving
- Ill fitted projects dropped
- New projects aligned to support business needs and implemented within the client's capacity for change
- Client awarded new government contracts due to proven reliability in the timely delivery of per spec products

**CLIENT PROFILE:** \$120M manufacturer / distributor of footwear implementing an ERP Business System at multiple sites, with complex standard and custom enhancements required.

**Challenges:**

- "Go Live" attempt failing
- Unable to process / ship customer orders
- Broken / incomplete software from vendor
- Data corruption throughout system including \$11M of non-deliverable invoices
- "Operations" devastated
- Customer orders being canceled
- Huge project cost overruns

**Actions Taken:**

- Advised and coached executive management
- Managed immediate operations crisis
- Refocused and project managed all client and software vendor project participants
- Mediated dispute resolutions between client and software vendor
- Lead re-specifying / development of enhancements, base code corrections, system testing / piloting
- Lead re-launch of corrected standard modules
- Lead launch of re-designed enhancements

**Results:**

- Stabilized business by creating temporary manual and programmatic workarounds to allow order processing, shipments and invoicing
- All client and software vendor participants took ownership of their project tasks and worked together
- Broken base software programs were corrected which enabled expected / as advertised functionality

- Re-specified enhancements met or exceeded business requirements
- Purchase and service contract between client and software author was renegotiated
- Formal legal action avoided
- Client is successfully managing their business using the entire ERP system and custom enhancements

**CLIENT PROFILE:** \$80M Footwear Manufacturer / Distributor suing ERP software vendor for complete project failure.

**Challenges:**

- Purchased software broken
- Data corruption across system
- Could not process or ship customer orders
- Business devastated losing major customers

**Actions Taken:**

- Provided litigation consulting
- Advised legal staff and client executive board
- Investigated and untangled project history
- Provided deposition testimony
- Wrote Expert Witness project diagnostic reports

**Results:**

- Client was awarded a multi-million dollar settlement

**CLIENT PROFILE:** Multi-million dollar distributor of electronic components, recently downsized due to market shift and now retrenching business in new growth markets.

**Challenges:**

- Insufficient customer order throughput
- Order return rate too high
- Increase of top line revenue required
- Need for greater capacity without additional cost

**Actions Taken:**

- Assessed operation's processes
- Diagnosed problematic processes
- Gained management approval for recommended procedural and reporting improvements using current system
- Implemented and monitored improvements
- Created finalized process map for continuous improvement practices without my involvement

**Results:**

- 33% increase in top line revenue
- Shipment errors and returns reduced to .8%
- No increase of head count
- 33% less order processing steps
- 17% reduction in paper forms used to process orders
- Current enterprise system re-implemented to be scalable
- Client was stabilized and achieved profitable growth in new markets

**CLIENT PROFILE:** Multi-million-dollar furniture manufacturer experiencing explosive sales growth in most recent 18 months. Plant head count increased 400%. Operations relocated to new facility which is 300% larger.

**Challenges:**

- Gross and Net profits not increasing with increased Revenue
- Negative cash flow
- Not meeting client delivery dates
- Insufficient product estimating and costing systems / methods
- Insufficient production planning and

**Actions Taken:**

- Assessed diagnosed process and system requirements
- Determined "actual" and "standard" costs
- Implemented estimating and costing practices and systems
- Implemented exit strategy for ill-fitted product lines

shop management systems

- Implemented shop floor planning, scheduling and reporting practices and systems

**Results:**

- 350% increase in profits and rising
- On Time delivery percentage increased from 25% to 85% and improving
- Ill-fitted product line dropped while maintaining good relationship with affected customer
- Available capacity filled with profitable business
- Cash flow now positive and continues to improve

**CLIENT PROFILE:** \$11 billion international manufacturer of high tech military weaponry implementing world-wide Architecture Governance standards.

**Challenges:**

Inconsistent global Architecture

Governance standards / processes for:

- Software / hardware acquisition and performance measurement
- Software development practices
- Call center and customer support

**Actions Taken:**

Worked as SME and writer with world-wide IT and End User specialists team to develop / write End-User procedure manuals for:

- Project consideration evaluations
- Project functional, technical, and budgetary approval processes
- Project management / implementation processes
- Requesting IT help center support
- Retaining IT related project resources

**Results:**

Successfully implemented standards

12/94-1/2000 **JBA INTERNATIONAL**, Rolling Meadows, IL. (International ERP Software Company)  
**Consulting Manager**

- Met \$5M revenue targets by leading and managing a 50 person staff comprised of project managers, consultants, programmers and help line staff.

**Business Unit Manager**

- Managed the successful turnaround of a \$200M client's project, to a "Live" status with a five person staff  
Many software, implementation, and project management failures stalled this client.
- Managed the successful turnaround of a \$700M client's project to a "Live" status  
This project had extensive modification, and contractual deliverables.  
The project was plagued with software bugs, inadequate modification definition, failed project management, and hostile client/vendor relationships.

**Principal Consultant**

**Awards Received:**

President's Award, Installation of the Year (team member), Customer Service Award & Customer Satisfaction Award

**POSITIONS HELD PRIOR TO 1994**

- Systems Implementation Manager for an ERP software company
- Business Systems Manager for a 5 site, 1<sup>st</sup> Tier automotive parts manufacturing company
- Application Consultant for an ERP software company