

## DIRECTOR OF FINANCE

### Summary

Seasoned Certified Management Accountant and financial leader with deep and broad health care industry experience in forecasting, financial planning and analysis, operations, reporting, and strategic planning

### Highlights

- CMA License #43352
- Strategic and financial planning expert

### Experience

Director of Finance 07/2002 to Current Company Name City , State

- Financial planning and analysis leadership and support for Consumer Service, Claims, Global Operations, Appeals and Grievances, Business Solutions Services, and Payment Integrity organizations with overall annual SG&A expense of approximately \$825M and 14,000 FTE
- Financial oversight of onshore and offshore vendor relationships with an annual budget of approximately \$120M
- Partnered with Operations Leadership to reduce operating expense by \$40M in 2014
- Serving as the finance lead on two operational excellence and optimization projects driving anticipated savings of \$39M in 2015
- Served as the finance lead on the consolidation of the Medicare and Retirement Customer Service organization, with an annual budget of \$120M, into Benefit Operations
- Served as the finance lead on the creation of the Payment Integrity organization with an annual budget of approximately \$28M and 170 FTE
- Served as the finance lead on the integration of an acquired service organization with a total annual budget of \$3.5M and 90 FTE
- Served as the finance lead for the creation and expansion of the in-sourcing of Rx Pharmacy Customer Service calls in Benefit Operations
- Served as the finance lead on the merging of the Dental and Vision Customer Service and Claim functions into Benefit Operations, a \$40M and 600 FTE consolidation
- Drove savings of approximately \$100k within my team as a result of realized staffing efficiencies
- Manage a team of six financial analysts

Director of Finance - UHC M&R 01/2006 to 01/2011 Company Name City , State

- Financial oversight for various Operations organizations across nine internal sites and seven vendor locations with an overall annual budget of approximately \$175M
- Financial oversight of vendor relationships with an annual budget of approximately \$45M
- Successfully reduced actual operating expense in the service centers by \$24M as a result of increased efficiencies, capital benefits, and the elimination of unnecessary spend
- Participated as the Finance subject matter expert related to the integration of an acquired customer service organization with total annual budget of approximately \$29M
- Served as the Finance functional lead on the consolidation of three customer service departments within the company, resulting in efficiencies of approximately \$6M
- Financial oversight and cost benefit analysis responsibility for Capital Projects in excess of \$5M annually
- Participated as a Finance subject matter expert related to the acquisition of new business totaling \$20B
- Completed a comprehensive review of all staff within the service centers and identified available efficiencies, resulting in savings of approximately \$60,000 annually
- Designed and implemented standardized, automated reporting capabilities resulting in savings of \$70,000 annually
- Completed a cost benefit analysis demonstrating the implementation of IVR technology equated to \$650,000 in annual savings
- Completed a cost benefit analysis demonstrating that outsourcing appropriate call volume equated to reducing cost \$3.4M annually
- Completed a cost benefit analysis demonstrating that utilizing a service center site in a low cost area equated to reducing cost \$2.0M annually
- Created and implemented long term forecasting and capacity planning models for the service centers which receive approximately 6,000,000 calls annually
- Managed a team of two analysts

Manager - Operations Support and Planning 03/2004 to 01/2006 Company Name City , State

- Received a special, performance based mid-year merit increase
- Recognized as the top employee within the department, which consisted of 25 employees
- Led a team of 6 Senior Business Analysts
- Developed partnerships with other departments, including Finance, Training, Sales, and Account and Product Management to improve forecast accuracy to 97%
- Created and oversaw short and long term staffing models and capacity planning documents in the call center, all clinical operations, and all non-clinical support staff
- Completed presentations to the Executive Leadership Team around key call center metrics
- Led a project implementing advanced capacity planning software which resulted in optimized hiring of staff
- Partnered with IT and led a project to create a data warehouse for call and desktop data which led to enhanced and standardized reporting
- Created "Critical Thinking and Analysis" documents which are currently part of the standard training curriculum
- Designed and implemented Operational reporting for both intake agents and clinical case managers which led to improved performance and reduction in cost
- Completed all Executive Level Operational reporting

- Provided recommendations to Executive Leadership on staffing strategy, workload planning, future reporting capabilities, and future client locations and workload
- Determined the service center location for all new client implementation
- Tracked seating and real estate across 18 sites and projected future seating needs based on anticipated growth
- Assisted other business segments in determining staffing needs, improving forecasting accuracy, and report creation, design, implementation, and production

Lead Business Analyst 07/2002 to 03/2004 Company Name City , State

- Received the performance based "Employee of the Quarter" and "Employee of the Year" awards
- Created and updated short and long term staffing models and capacity planning documents in the call center, all clinical operations, and all non-clinical support staff
- Created and maintained a short term scheduling tool used to build schedules within the call center to optimize business performance
- Participated on a project consolidating 12 call centers into two accounting for overall savings of \$5M annually
- Built and completed all monthly Executive Reports
- Developed partnerships with other departments, including Finance, Training, Sales, and Account and Product Management to improve forecast accuracy to 97%

Senior Business Analyst 02/2001 to 07/2002 Company Name City , State

Senior Business Analyst 10/1999 to 02/2001 Company Name City , State

Education

AAS : Accounting Hennepin Technical Community College City , State

MS : Economics Florida State University City , State

BA : Economics Franklin and Marshall College City , State

Interests

Hennepin Technical Community College Accounting Advisory Board Member

Skills

Financial planning and analysis, budgeting, reporting, strategic planning, forecasting, operations