

## **Mahmud Khan**

### **SUMMARY:**

- A highly experienced delivery Manager and ERP consultant with strong functional & technical experience. Driving IT business applications, and complex transactions.
- Over 20 years of experience in the IT and Financial industry associated with Global clients, software development, configuration, and customization. A proven leader and motivator with strong Business Analysis and Project Management expertise and excellent financial knowledge.
- An analytical problem solver who anticipates issues, and risks, and initiates streamlined operations to resolve concerns and improve efficiency.
- Excellent communication and presentation skills and a record of accomplishment in managing strategic relationships with Business, IT, Risk managers, and vendors.

### **SKILLS AND CORE COMPETENCIES:**

- AX 2009/AX 2012/D365
- Procure to Pay/Order to Cash
- Retail Products/Sales Tax
- GL/AP/AR/Fixed Assets
- Inventory Management
- RMA, RTV, Dropships
- Data Integration/Mapping
- Excel/MS Project
- MS SQL/Oracle
- CRM/MS CRM
- Banking/Loan/Lease
- Commercial Lending
- Capital Market
- Loan IQ/Risk Rating
- Manage Projects
- Advice Executive Management
- Business Strategy
- Best practice in the industry
- Agile & Waterfall methodology
- Scope Creep/ RACI Matric
- Data and Risk Analysis

### **EDUCATION & CERTIFICATIONS:**

- MBA Finance and Derivatives, Wilfrid Laurier University Waterloo, ON
- Bachelor of Science (Computer Systems), Minnesota State University Mankato, MN
- Certifications: ITIL
- Training: PMP & Six Sigma Yellow Belt Zurich Insurance Group North America WTP
- MBA in Finance. CFA Level II – Working toward level III and D365 Supply Chain certification.
- Certified in Microsoft Dynamics 365 F&O, AX 2012 Finance, AX 2012 T&L, and AX 2012 Retail.

## **WORK EXPERIENCES:**

**NJTECH INC, Tampa, FL**  
**Solution Architect D365 F&O & D365**

**Jan 2025 to Present**

### **Responsibilities:**

- Client engagement and high-level meetings with stakeholders. Providing solutions with best practices.
- Working on D365 F&O AP automation and D365 automation via co-pilot and AI.

**Sonata Consulting / TMS International, Pittsburgh, PA**  
**Lead functional consultant**

**Oct 2024 to December 2024**

### **Responsibilities:**

- Client engagement and high-level meetings with stakeholders. Providing solutions with best practices.
- Drive the implementation and optimization of Dynamics 365 F&O
- Trading platform- scrap trading.
- Configuration and testing.
- Procurement and Payment to freight Vendors.

**Zones, Auburn, WA**  
**Solution Architect**

**Oct 2022 to Sep 2024**

### **Responsibilities:**

- Client engagement and high-level meetings with stakeholders. Providing solutions with best practices.
- Lead client discussions on C-Suite and functional levels around requirements and design.
- Review and integrate all application requirements into Architecture design, including functional, security, integration, performance, quality, and operational needs.
- Design and implement new cloud architecture solutions for clients, reducing customer running costs.
- Design and implement Project Management and Accounting.
- Manage key Project initiatives driven by the PMA leaders and business stakeholders.
- Deliver SCM Inventory Management, Product Management, Planning, and Warehouse solutions.
- Collaborate with business stakeholders to create Cost Benefit Analyses for various initiatives.
- Solution Co-Pilot AP and AR automation.
- Intensive on D365 Finance and Operations, and Supply Chain Management, driving process improvements.
- Responsible for architecting, designing, and developing CC queues, e-waste, and MDF solutions that meet business requirements.
- Worked on Procurement. Purchase order for the Vendor to generate and Post the Product receipt for the Purchase order. Generate and Post the Invoice for the Purchase order and create the Invoice Journal.
- Purchase order for the Vendor to generate and Post the Product receipt for the Purchase order. Generate and Post the Invoice for the Purchase order and create the Invoice Journal
- Design and deliver CE solutions including e-waste.
- Responsible for architecting, designing, and developing comprehensive solutions that meet business requirements.
- Ensured tax setups and regulatory compliance for legal entities across multiple jurisdictions
- Strong knowledge of Legal entity setup. Created multiple legal entities for Europe and North America
- Fulfilled the Microsoft Licensing requirement.
- Lead daily support operations of the F&O system by working closely with Subject Matter Experts (SMEs) to support all departments and users, directly aligning with corporate policies and procedures.
- Responsible for final sign-off on overall design.
- Identify and evaluate the risk to eliminate or mitigate risk in a D365 engagement.

**Omnicom, New York, NY**

**Jan 2022 to October 2022**

## **Lead Functional Consultant**

### **Responsibilities:**

- Client engagement, with high-level meetings with stakeholders. Providing solutions with best practices.
- Led client discussions on media, customizations, and functional levels around requirements and design.
- Strong knowledge of Legal entity setup. Created multiple legal entities for Europe and North America
- Expertise in designing and optimizing the chart of accounts tailored to each legal entity's financial structure
- Designed and implemented solutions in F&O.
- Streamline the CE processes.
- Fit-Gap analysis & Conference Room Pilot.
- Configured custom "Project Management & Accounting"
- Worked on enhanced project management capabilities.
- Subscription billing and revenue recognition.
- Validation and support of the solution.
- Designed Cutover plan.
- Involved in cut-over and Go-live activities.
- Worked on Microsoft Licensing
- Collaboration of features across the project lifecycle

**William Sonoma, Claremont, NC**

**June 2021 to Jan 2022**

## **Lead Functional Consultant**

### **Responsibilities:**

- Client engagement along with high-level meetings with stakeholders. Providing solutions with best practices.
- Responsible for architecting, designing, and developing comprehensive solutions that meet business requirements
- Strong knowledge of Legal entity setup. Created multiple legal entities for Europe, North America, and Asia
- Delivered Solutions on Integrations, Custom OMS, and SCM. Cost Management and Finance
- Provided support to finance leadership with establishing and monitoring the Company's D365 Finance Information Systems processes and controls.
- Worked on Procurement
- Provided solutions for AP, AR, and Project management automation.
- Manufacturing Cost calculation – Costing version, Cost groups, Cost categories, and Costing sheet.
- Worked on requirements, User Stories, Tasks, Features, Data Entities, and Data Management.
- Collaboration of features across the project lifecycle
- Defined Cutover plan, strategy, and activities.
- Worked on AP invoice to ensure that PO, No-PO, FX, and charges are compatible with the Oracle AP integration and repository.
- SCM streamline solution includes 3 PL billing automation. Procure Pay and EDI solutions.

**KPMG, New York, NY**

**March 2020 to April 2021**

## **Solution Architect (D365 F&O)**

### **Responsibilities:**

- Developed a deep understanding of the business objectives with internal and external stakeholders. Evangelized the product vision and build trust by maintaining an accurate and achievable roadmap.
- Worked on solution visibility of the solution landscape through delivery and ownership of the solution.
- High-level meetings with the main stakeholders to discuss solutions and best practices.
- Worked on KPMG Product "POD."
- Executed day-to-day and long-term strategic decisions.
- Created functional and Integration solutions.

- Designed and implemented Project management and Accounting (Project phases, Project structure, quotations, Project contract, WBS, Project forecast, and budget.
- Strong knowledge of Legal entity setup. Created multiple legal entities for Europe, North America, and Asia
- Ensured tax setups and regulatory compliance for legal entities across multiple jurisdictions
- Worked on requirements, User Stories, Tasks, Features, Data Entities, and Data Management
- Supported finance functional consultant to configure financial modules (AP, AR, GL FA, Budgeting, Inventory, and expense management modules.)
- Supported SCM functional consultant to Configure the Supply Chain module (Inventory, Warehouse, Product and information, and Cost mgmt.)
- Designed integrations like ADP payroll, Concur, and SKG.
- Cost calculation – Costing version, Cost groups, Cost categories, and Costing sheet.
- Worked with technical resources on Azure, Azure portal, and Azure services.
- Worked with Audit and SOC compliance and financial reporting, financial insights
- Designed Cutover plan, strategy, and activities.

**Douglas Elliman, New York, NY**  
**Financial Consultant (D365 F&O)**

**April 2019 to Nov 2019**

**Responsibilities:**

- Provided the financial implementation overview, challenges, and risks to executive management.
- Collaborate with management and cross-functional teams to ensure a complete understanding of business requirements
- Configured AP, AR, GL, and Expense management modules
- Worked with the Audit and SOC compliance team.
- Designed reviews and recommended automating the processes.
- Streamlined the Commission workflow and cash posting.
- Contributed to the improvement and performance of internal controls and business processes.
- Worked with the P&L team on Power BI and Financial reports. Redesigned the dataflow for Power BI
- Reviewed all financial function FDD with Controller and recommended changes according to business process and industry best practices.
- Worked upstream and downstream, including configuration, development, and testing.
- Provided support in UAT testing and test scripts.
- Worked with System admin and technical resources on Azure, Azure portal, and Azure services.
- Worked on Expenses management report reimagined including two-tier workflows.

**Clever Devices, Woodbury, NY**  
**Project Manager (Dynamics 365 F&O)**

**Jan 2019 to March 2019**

**Responsibilities:**

- Directed, organized, and monitored the implementation of all programs including CRM and D365, and enhancements for greater efficiency in the business process.
- Collaborated with management and other employees to ensure a complete understanding of business needs
- Worked closely with the consultants and senior managers to provide high-quality strategic leadership.
- Leads discovery meetings and requirements sessions to identify business requirements for the consulting firm.
- Identified resistance performance gaps and worked to develop and implement corrective actions.
- Identify strategy execution by providing executive oversight, guidance, and support for significant strategic initiatives.
- Analyzed and reviewed to ensure consistency of application and compliance with regulatory policies and procedures.
- coordinated project resources to execute activities with Project Management.
- Tracked the progress against deliverables adjusted plans as required and provided regular status reporting to the VP.

- Proactively looks at project activities, dependencies, and risks.  
Provided ongoing input into the delivery practice through suggestions and implementations of best practice

**Le Creuset, Charleston, SC**  
**Delivery Manager (Dynamics AX 2012 R3)**

**July 2018 to Dec 2018**

**Responsibilities:**

- Project overview, environments, services, and planning activities to ensure milestones are achieved within the agreed timeframe.
- Responsible for the delivery of all services related to enterprise conferencing and collaborative technologies.
- Designed, developed, and delivered functional & technical solutions to meet customer/business technology requirements.
- Engaged with appropriate groups and resources, as appropriate, to deliver projects, engage with the business, and facilitate delivery of deliverable items.
- Provided overall project communication to stakeholders to meet project requirements and stakeholder expectations.
- Managed and directed the activities of the Le Creuset of the USA IT Department.
- Ensured data governance methodologies are adhered to within the regulated environment.
- Provided appropriate communications as needed to business partners and stakeholders regarding relevant application issues, outages, and enhancements.
- Build and maintain relationships with internal and external resources needed to ensure successful delivery of AX and collaboration of AX services globally.
- Managed and monitored the successful delivery and implementation
- Provided the direction and control of work performed in the framework of the project, including monitoring the critical path and implementing appropriate corrective actions.
- Performed incident management process reviews to ensure efficient and effective workflow and to effect improvements in response time and resolution.
- Managed and oversaw Problem Management across all Le Creuset teams to drive performance excellence based on business-defined priorities.
- Ensured that infrastructure and Application teams used the Dynamics life cycle and AX Intelligent Data Management Framework (IDMF) to optimize the system's performance.

**American Waters, Cherry Hill, NJ**  
**Consultant (Dynamics AX 2012/365) – Contract AX 2012**

**March 2018 to July 2018**

**Responsibilities:**

- Managed the offshore team including the Project manager, two business analysts, and five developers.
- Experienced working with Microsoft AX and D365, ISVs, and other integrations.
- Performed and reviewed the project deliverables, software, and hardware, and reported on project performance.
- Managed client relationships and communicated with/ C-level executives/sponsors
- Managed all aspects of a project, including planning, organization, and implementation of project activities.
- Worked on AR settlement process and enhancement (recommend changes & provide the solution)
- Worked on SKG billing, payment, and settlements. Work on Procure to Pay and Order to Cash, FA,
- Managed and monitored the project process and tracked progress against milestones, deadlines, and budget. Report on these items to key management.
- Worked on American Home Shield partner & and CRM integration. Functional design documents, Business intelligence, Configuration, and UAT Testing. Testing Strategies and Test Scripts.
- Created Functional design document FDD software for AR Settlement and America Home Shield
- Worked on the cross-functional team testing strategy, analysis of existing test strategy, gap analysis, and working across teams to mature test integration strategies.
- Lead the development team in developing and implementing best practices.

- Collaborated closely with development teams to deliver software releases with an ever-increasing level of quality.
- Worked closely with Client, and Management, Development, Support, and Services teams to prioritize assignments and manage risks/issues to ensure the successful delivery of high-quality Packages.

**Enterprise Software Associate, Melville, NY**  
**Project Manager (Dynamics AX 2012 R3 Implementation)**

**Sept 2017 to Feb 2018**

**Responsibilities:**

- Set up the budget and managed the Dynamics AX Project.
- Defined the scope of the project and determined the objectives and expectations.
- Excellent Communication, Collaboration, and Interactive Team Management skills.
- Maintained continuous alignment of project scope with the strategic business objective.
- Supported the execution of plans by employee-facing managers and business leaders.
- Negotiated changes to the scope of a project of work with the client and key stakeholders
- Facilitated the testing process with internal and client testing teams.
- Accomplished project business goals and objectives within defined budget and time parameters.
- Managed project plans, budgets, and resource schedules weekly.
- Look at the resources and ensure they are not facing any hurdles and ambiguity.
- Updated the executive management team about the project weekly.
- Managed issues and risks associated with the project.
- Effectively communicate with all stakeholders including the development team and EU Subsidiaries.
- Identified risks and develop the appropriate approach to minimize their impact.
- Monitored the project budget and expenditures.
- Enabled Consultant and Developer on integration items and facilitated Third-party integrations.

**Biz Tech System, Mississauga, ON**  
**Project Manager (IOS/Android mobile Application)**

**May 2017 to Aug 2017**

**Responsibilities:**

- Experienced project management with complex and multi-functional projects.
- Developed project plans including timelines and resource allocation Serve as a liaison between business and technical aspects of projects.
- Daily Scrum team meetings for activities status updates.
- Reviewed the business requirements, and developed an implementation plan, and risk assessment.
- Developed and implemented Change Management plans.
- Excellent communication with all stakeholders including the development team overseas.
- Identified risks and develop the appropriate approach to minimize their impact.
- Facilitated assistance with coordinating deliverables and project assets to assist the project team.
- Managed globally distributed teams to drive their deliverables for quality.
- Collaborate at multiple levels, across divisions, functions, and cultures.
- Set up documents on SharePoint for project activities.
- Monitored the project budget and expenditures.
- Produced clear visibility on Project status and progress.
- Worked on risk mitigation.
- Ensured that project deliverables were on time, within budget, and met or exceeded the requirements.

**Living Spaces, La Mirada, CA**  
**Functional Analyst/Project Lead (MS Dynamic AX 2012 T&L, Retail, Finance, and CRM)**

**April 2015 - April 2017**

**Responsibilities:**

- Good understanding of retail management, retail processes, and functionality.
- Elicitation of business requirements with internal and external stakeholders about their processes, policies, business processes, business rules, workflows, customization, and integration.

- Collaborated with business teams on requirements.
- Worked on Configuration of Procure to pay. Purchase orders, Special orders, RTV.
- Worked on Configuration of Order to Cash. Sales and Marketing, Backorders, RMA, and Dropships.
- Worked on Configuration of Finance module AP, AR, FA, Budget, and Inventory Management.
- Dynamics AX Retail set up an online store that is the type of retail channel that customers can access on the web. Add the store to the appropriate organization hierarchies, Configure the store details, and publish the store online with third-party integration.
- Worked across the organization with business teams to determine the feasibility of operations.
- Created a design document and functional requirement document. Analyze business requirements of existing processes, systems, and data stores for gap analysis and recommended improvements.
- The configuration of the point-of-sale RPOS terminals centrally, including visual profiles, functional profiles, user interface layouts, and employee permissions and user privileges.
- The configuration of Product hierarchy, Category hierarchy, Discounts, Loyalty programs, loyalty cards, and Gift cards.
- Retail store setup and online Payment Services online payment processing in RPOS.
- Created FDD, Business, and Functional requirement documents including User procedures.
- Worked with end-users for gap-fit analysis, User training, SQL, Tableau reports & and CRM analytics.
- UAT Testing, Functional Testing, and Test Scripts.

**Delcit Inc, Arcadia, WI**

**July 2014 to March 2015**

**Functional Consultant – Contract (MS Dynamic AX 2012 T&L, Retail, and CRM)**

**Responsibilities:**

- Elucidated business requirements with internal and external stakeholders about their processes, policies, business processes, business rules, workflows, customization, and integration.
- Dynamics AX retail set up an online store that is the type of retail channel that customers can access on the web. Add the store to the appropriate organization hierarchies, Configure the store details, and publish the store online with third-party integration.
- Configured the Procure to pay, Inbound Loads, EDIs, and RTV.
- Created a design document and functional requirement document. Analyze business requirements of existing processes, systems, and data stores for gap analysis and recommended improvements
- Configured the point-of-sale POS terminals centrally, including visual profiles, functional profiles, user interface layouts, and employee permissions and user privileges.
- Configured the Product hierarchy, Category hierarchy, Discounts, Loyalty Programs, and Gift cards
- Configuration and customization of Purchase Requisition features along with Approval workflows, email notification, and end-user training.
- Conducted Gap fit analysis, and worked on client customization, configuration, and testing. Also, I recommend improvements
- Created FDD, and BRD, and configured the core Dynamics AX Retail module and AX Financial module.
- SQL Queries for data analysis, SQL Tableau for inventory value reports, expense reports, etc.

**Zurich Canada WTP, Toronto, ON**

**Sept 2012 to June 2014**

**Business Consultant (MS Dynamic AX, Nordic Insurance, Travel & Medical Insurance, BI &Dashboard)**

**Responsibilities:**

- Elucidated business requirements with internal and external stakeholders about their processes, policies, business rules, workflows, process flow customization, and third-party software interfaces Vantage Point
- Presented initial base plan with new processes and workflows to key stakeholders.
- Liaise with the Project Manager, different business units, and the client to ensure delivery is on time and meets a high standard of service level.
- Leads detailed requirement phases identifying, tracking, escalating, and/or resolving business requirements. Conducted workshops and JAD sessions.
- Provided ongoing assessment of an improvement to a claims service model.
- Worked on Aetna enrollment claims training and prepared training material for the Aetna claim system.

- Implementation and configuration of Nordic Insurance core modules sales, claims, and recovery.
- Involved in Functional design and application storyboarding
- Provided analysis and solutions to the Manager.
- Assisted a senior consultant with the implementation & and configuration of the Dynamics AX Financial module and assisted the client in the implementation and support of the Dynamics AX solution.
- Created designed documents and configured the core Dynamics AX Financial module.
- Implemented and configured AX Financial Modules, GL, AP, AR, Fixed Asset, and Bank Management.
- Reviewed and updated the requirements, specifications, business processes, and recommendations related to proposed solutions
- Used the Microsoft Sure Step methodology (Microsoft SDLC) to improve the quality of the project continuously.
- Employed Microsoft Dynamics AX BI tools for data warehouse and risk and claims reporting.
- Executed test scripts, and facilitated defects tracking, and UAT testing.

**Decision Solution, Toronto, ON**

**May 2011 to June 2012**

**PM Contract Credit Solutions (Credit Risk, Loan Origination System, Auto Portal Financing and leasing, Equipment Financing, and leasing)**

**Responsibilities:**

- High-level talks with clients to understand their business requirements and concerns and to provide a viable tailored solution for their needs
- Strong leadership qualities to lead project initiatives and negotiate with various levels of business users, stakeholders, and technical IT personnel.
- Ensured integrity and delivery of multiple projects concerning time, budget, scope, and change
- Facilitated the development of the project definition (Scope and Deliverables)
- Developed and maintained project plans, including Work Breakdown Structures, timelines, resource plans, risk plans, and other project-related plans.
- Provided overall leadership and direction to the team for solution delivery of Business Intelligence and Data Warehousing.
- Applied effective project management methodologies and control techniques.
- Successful utilization and Project Management strategies
- Ensured risk assessments were completed, and contingency plans were identified.
- Lead the team performance through all stages of the project life cycle (PMLC).

**Mississauga, ON**

**Aug 2007 to April 2011**

**Analyst (Capital Market, Credit Risk, Commercial Lending, Small Business Finance, and Equip Financing) Projects (Capital One Bank, First Merit Bank, Fifth Third Bank, and Key Bank)**

**Responsibilities:**

- High-level discussions with clients to see how to capture their Capital market data at the front end and book the deals. How to integrate their Dual Risk Rating and use Fico Liquidity Score with D&H Product.
- Planned and managed multimillion-dollar projects, strategizing business goals with technology solutions to drive process improvements, competitive advantage, and bottom-line gains.
- Led teams across broad technical, financial, and business disciplines. Focused teams on business objectives and tracked progress to ensure project milestones were completed on time, on budget, and with the desired results.
- Liaise as a Business Consultant with Fifth Third Bank stakeholders. I was involved in FSD, BRD, business requirements, functional requirements, and process analysis for Fifth Third Commercial lending, structured loans, and Credit Risk Management. Responsible for seamless Commercial lending and Credit risk management implementation using DRR and Moody Risk.
- Captured Business needs of Fifth Third and Key Bank financial products to optimize their credit risk systems using Dual Risk Rating. Created the design specifications to comply with regulatory (Patriot Act), Anti-money laundering (AML), Federal, and State laws. US and international regulatory and customer contractual compliance, ensuring regulation and Bank policies are meeting the commitment.



- Created Use Cases, GUI Diagrams, Activity Diagrams Workflow, and Process Flow Diagrams.
- Managed the detailed aspects of operations with third-party vendor and the Michael Bloomberg terminal
- Involved in Credit Exposure and derivatives including Committed, Advised, Syndicated (Pre-Close), FX/Derivatives, Future/Options, OTC, Counter Party Risk, Liquidity Risk, Treasury Management, Fixed Income, Bond/Debt, Interest Rate, and Equity /Investment.
- Basel II reports requirements from a business intelligence perspective.
- Performed financial analysis ad-hoc reports, and risk ratings. Involved in preparing KPIs that encompass industry, business, and financial risks.
- Participated in all projects with PM methodologies & and system development life cycle (SDLC) deliverables.