

Director, Application Solutions Director, Application Solutions Business Focused IT Director Mentor, OH Effectively use technology to transform business with new opportunities; support and optimize existing people, processes and operations; mitigate technology associated risk; and architect fast, reliable systems ready for the future. Work Experience Director, Application Solutions Cohen & Company - Cleveland, OH February 2018 to May 2019 Directed enterprise application and operational strategy to a top 5 fastest-growing, 650+ employee accounting firm ensuring scalability and reliability of systems. Provided widespread expertise to all facets of the business through portfolio and project management within the Applications Operations segment of IT. Served as the technical lead and strategy team member for Shared Services (HR, Marketing, Finance, IT & Support Staff). Directly collaborated with executive management related to operational and systematic consistency. Responsible for enterprise-wide systematic architecture for application development, implementation, integration, support, and system reliability; business intelligence suite architecture, design, and delivery, and departmental leadership, staffing, and resource management. Served as an integral collaborative resource with executive management through major corporate actions, including mergers & acquisitions, IT departmental reorganization, structure, and leadership transition, portfolio and project management initiatives, industry & vendor trends affecting the business, and budget and cost management. Portfolio & Project Management Initiative - Managed the shift in philosophy of an Application Operations Group to an Application Development Team. Created a business analyst group, separating the technical aspects from the business communication portions of projects and portfolio management. Migrated the team and department to an Agile-like methodology using Azure DevOps, bi-weekly scrum sessions and bringing the SDLC and CI\CD in more direct synchronization with project management. Business Intelligence Architecture - Architected a sophisticated Business Intelligence platform to centralize, normalize and apply business rule transformations and exception reporting on data from all disparate business databases, providing a platform for an accurate, low-lag, aggregated data warehouse. Utilizing a cost-effective approach to distributing data via PowerBI, the enterprise is set for user secured desktop and mobile access to critical, timely business information and KPIs. Star

ERP Implementation - Technical lead for the implementation of Star Practice Management ERP system and the conversion of two separate previous practice management systems, including one from a newly acquired firm with disparate data structures and processes. Provided the business with insight into leveraging newly available data for previously unavailable business intelligence.

Data Security & Compliance - Responsible for the ongoing security of enterprise and client data from intrusion prevention, DLP, mitigating regulatory risk from industry best practices, and compliance-based laws including HIPAA and GDPR. BlockChain & CryptoCurrency Audit

Application - Architected a solution to reduce the time required to perform cryptocurrency fund audits by over 90% using third-party RESTful API endpoints, JSON, SQL Server, ETL Engines and Microsoft Dynamics 365. Led the team of internal resources, business subject matter experts, and additional outside developers to facilitate a modularized approach to deliverable creation.

Application Solutions Manager Cohen & Company - Cleveland, OH October 2011 to January 2018
Leader of the Applications Operations segment of the IT Department, responsible for providing guidance and direction for the entire enterprise application suite including third-party software and software development. Provided technical expertise to all parts of the business relating to software and operational procedure. Responsible for application performance, reliability and strategic direction of all application implementations and integrations, serving as technical architect, project manager and business analyst on all software and data related initiatives of the enterprise. Provided thoughtful leadership to subordinate resources in the department, requiring staff involvement and constant knowledge transfer throughout to ensure successful growth of the department. Audit

Efficiency Initiative - Led a team comprised of both technical resources and business resources to analyze and develop procedurally certifiable solutions to ingest similar data from a multitude of sources, perform systematic reconciliations and cross-referencing similar information to provide previously manually created deliverables, exponentially reducing production time, procedural difficulty and increasing accuracy of output to 100%. Reporting, Dashboard Development -

Responsible for the aggregation, storage, and display of interrelated, disparate data through process consistency enforcement, requirements and business use case analysis, data storage

structure, ETL management, and data retrieval and display performance. Used appropriate display methodologies including dynamics Excel workbooks, HTML formatted reports, custom dashboards, Google Charts, SSRS, and other technologies as needed.

Enterprise Financial System Support - Responsible for all integrations and process management related to finance department needs. Included ETL management, custom reports, process evaluation and recommendations, and custom development. Automated significant, time-consuming back-office tasks, including expense and payroll management, enterprise performance reporting, and financial forecasting and budgeting.

Merger & Acquisition Technology Lead - Provided the necessary strategic direction for several mergers and acquisitions for both the wealth management and accounting divisions of the enterprise, focusing the conversations on process and change management philosophies within the business. By putting process first, evaluating "was" and "to-be" changes to both sides, strategic integration and conversion plans were presented, signed off and completed internally through low-cost, high-success data integration and development efforts.

Digital Marketing Strategy - Continually involved in the growth of the digital marketing efforts of the firm. Provided the business and the marketing department with insight to current trends, functional capabilities, cost\benefit analysis, leading a collaborative team to deliver new initiatives, enabling the use of CRM and CMS systems to make the firm an industry leader among peers for customer relationship management through information management, web analytics, and campaign management.

Next Generation Web Site Implementation - Technical lead and strategist for the conversion of a custom built, dynamic, external facing web site to a Content Management System driven web site, allowing for more timely web site management by the marketing department, reducing the necessary involvement of IT for simple to moderate changes to the structure or content of the site.

Scheduling Management System - Implemented a cutting edge scheduling and resource management module into the Sheets workflow system, leveraging the opportunity created from the integrated practice management and workflow system. This highly sophisticated solution provided capacity management that far exceeded available off-the-shelf applications, providing both a user-level view of current and future work, as well as firm-level resource utilization and proactive

visibility of scheduling conflicts. Client Onboarding System (New Client Data Sheet) - Proposed, designed and led the development and implementation of a centralized system to streamline the collection and evaluation of all new clients onboarded to the firm. The system achieved business efficiency by validating the necessary information for risk management, compliance, and data needed by the various systems for the appropriate lifecycle management of the client including marketing, workflow, deliverable and employee responsibility. CRM Implementation & Conversions - Technical Lead and Business Analyst for the conversion of several disparate contact and communication management systems into Microsoft Dynamics 365 (CRM at the time). This large-scale integration not only entailed the conversion of a large volume of unstructured, inconsistent data, but also the inception, technical creation and implementation of new processes creating efficiencies, features and mindsets not previously available to the business. Document Management & Retention - Managed compliance needs within the business to continue to drive proper document management policies and structures, including network directory structure, application data history and purging, conversation and integration nuances and needs related to compliance efforts, and application of firm policies to retention through merger and acquisition projects. Database Administrator & Software Developer Cohen & Company - Cleveland, OH November 2004 to September 2011 Responsible for all aspects of data management relating to internal or third-party applications including database design, system performance, business continuity and disaster recovery surrounding databases and software packages. Provided requirements elicitation, software design, led development and training for all internal software development projects and corresponding data management and reporting. Integration, Data Management & Reporting - Responsible for the curation, integration and efficiency efforts afforded by a centralized data platform. Created an audit methodology for data changes to both proprietary and third-party applications, allowing for data oversight, compliance, proactive cross-system data updates and synchronization. This mindset of centralized, consistent data allowed for the creation of robust reporting, exception management, real-time synchronization and alerting, and set the stage for future, sophisticated business intelligence and service based model through a disparate set of

technologies. SharePoint Intranet - Implemented the shift from a rudimentary, minimalistic intranet to a fully functional SharePoint Intranet allowing for dynamic, organized and secured content with alerts and document retention policies. Managed the platform, direction, content and provided a continual a strong, passionate voice to the business for business ownership and user adoption.

Proprietary Application Development - Directly responsible for any new development opportunities, maintenance, support, enhancements or opportunities surrounding the suite of internal applications used. This included the gamut of SDLC including idea inception, business support, requirements analysis, development, deployment, training, support, post-mortem analysis and next-step initiatives.

Third-Party Application Management - Committed to the proper deployment of all third-party applications used within the enterprise, from the point of software selection and the necessary SWOT analysis, to appropriate conversion and implementation from both the technical and change management perspective, to the ongoing user adoption, utilization, training and performance needs, to upgrades and sunsetting or conversion of the solution. Database Administration - Responsible

for the holistic approach to data management for both internally developed applications and third-party application data, including uptime, performance, BC/DR, and ensuring platform scalability and future-readiness. External Web Site - Part of the strategic direction team for the next generation of

a digital presence, moving from a brochure-ware site, to an interactive, dynamic platform. Performed the development, maintenance and support for the site while also providing the Marketing Department insight as to the most current trends and direction for web presence. Software &

Database Engineer RRJB Consulting 2001 to 2004 Independent consultant offering software and database services. Created several highly successful and award winning software packages including a performance management system, workflow management system, HRIS system and a

quoting system, for clients in both service and manufacturing verticals. Software Developer Cohen & Company 1999 to 2001 Software consultant creating several software and reporting packages, each innovative in design, with above-average longevity in their respective uses, including a high

performing, high volume, web-based data search retrieval system for a local government office.

Education Bachelor of Science in Computer Science John Carroll University 1999 Skills Strategic

Planning, Excel, IT Management, Excel, Vendor Management Assessments Technical Support
Highly Proficient August 2019 Measures a candidate's ability to apply protocols to identify errors and solutions in order to maintain system function. Full results:
https://share.indeedassessments.com/share_assignment/m9t4ypt1bfahhuwi Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

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