

IT Financial Analyst IT Financial Analyst IT Financial Analyst - The Clorox Company Danville, CA

Work Experience IT Financial Analyst The Clorox Company - Pleasanton, CA September 2018 to Present

Provide IT Financial Business process, policy and procedure guidance to IT PMO and BSC Organizations:

- Provide Finance Portfolio 'end-to-end' business & financial support for Investment project's budget, planning, execution & project close-out activities throughout IT Solution Delivery Life Cycle (SDLC) delivery phases (Agile/Waterfall pathway & Phase Gate Review process).
- Assist in financial management & reporting, ad hoc research & analysis, applicable financial tools/job aids and interpretation IT financial reports and dashboards.

Partner with IT Finance and Program Management Office -

- Provide Budget/Forecast vs. Actuals analysis and monthly General Ledger results validation to ensure the accuracy and reconciliation of project transactional data.
- Prepare and maintain supporting documentation for monthly, quarterly and annual reporting requirements.

Partner with IT Program Managers, Business Relationship Directors and Project Coordinators:

- Advise on development of budgets and forecasts, manage and track monthly expenses to avoid exceeding budget; meet regularly to determine project cost drivers and review variance analysis results.
- Educate internal clients on functionality of Apptio reporting tool and interpretation of financial dashboards, Portfolio data extracts, and financial workbooks.

Resource planning & accurate forecasting support provided -

- Operating (OPEX) vs. Capital (CAPEX) expenditures - capitalization of Internally Development Software (IDS) & Purchased Software - capitalization, WIP account & depreciation expense thresholds, guidelines & processes
- SAP; Journal Vouchers (accrual, re-class, recharge & Travel re-class); Capitalization Authorization Form;
- Forecast task descriptions and charge codes

Partner with Corporate Finance:

- Liaison between PMO & Operational Accounting for month-end close activities; interpretation and implementation of accounting policies & procedures; ad-hoc research & analysis; task descriptions and charge codes (Capital vs, Operating); capitalization; work-in progress (WIP) and depreciation of Internally Development Software, computer equipment, purchased software; resolve General Ledger financial issues & review and enhance finance business processes.

PMO Financial Analyst Kaiser Permanente - Pleasanton, CA October 2015 to September 2017

Financial management for a large

Oracle HCM Cloud transformation program - Managed program budget/forecast (\$65 million annual budget) in all OPEX and CAPEX planning for Kaiser's largest HR program. Successfully forecasted to less than a 3% variance in the overall program spend. Resource management - Led the entire resource planning process in Clarity/RPM (Approximately 200 Resources) for KP's largest HR- IT program, which enabled a tighter monthly forecasting process. Tracked all resource timesheets against plan and reported on variances to all track leads. Planning - Supported program manager in updating critical milestones and all tasks in Clarity. Updated the entire HCM program's monthly financial performance to HR-PMO leadership. External Vendor Management - Worked with program director regularly to manage efficient communication and detailed invoicing between SOW vendors working on the HCM cloud project. PMO Reporting Analyst (Consultant) AAA Insurance Exchange - Walnut Creek, CA July 2014 to June 2015 Created and distributed all daily dashboards for a large nationwide, multiple implementation policy administration system for key program stakeholders. Daily graphs include all deliverables on story writing, design, development, functional testing, defects (planned & natural) and regression testing. Managed a sophisticated sprint development model to capture a three year work effort view across multiple releases; provide guidance to program director and deputy general manager. Utilized IBM - RTC to capture real time estimates for story point sizing to update the sprint development model accordingly, which clearly communicated future sprints to PAS leadership. Managed an automation project to link all program defects from HP Quality Center and all other program deliverables from the IBM - RTC environments to the PMO daily dashboards. Project Controller (Consultant) Chevron, Inc - San Ramon, CA December 2013 to March 2014 Led the efforts on a Multi-site wireless project in the Infrastructure Assets group, with project financial management and resource management. Worked with the department head to develop a standardized monthly financial process for the entire Infrastructure Assets IT program initiatives. Budget/Financial Analyst (Consultant) Cisco Systems - San Jose, CA February 2013 to September 2013 Led quarterly forecast effort for a large Oracle R12 Implementation Program. Met regularly with program stakeholders across business units (Quote to Order, Order Management, Supply Chain and Finance) to gather Scope requirements and

drive budget requests. Worked with cross functional stakeholders to align resources on LSS program scope. Developed the program budget from a bottoms-up resource plan, which included all functional FY'14 budget requirements spanning Cisco's entire product line.

PMO Analyst/ Project Financial Manager (Consultant) AAA Club Services - Emeryville, CA July 2012 to February 2013

Responsible for tracking all project budgets for AAA Club Services and reporting financial results to PMO manager, finance stakeholders and accounting. Month end reporting for all projects. Created all weekly trend reports for portfolio managers and distribute to key stakeholders. Responsible for all month end accruals, invoice processing, monthly reporting to PMO leadership for all enterprise-wide projects at AAA - NCNU Club Membership Services. Administrator for all projects (set up new contractors in the Workday system to log time, set up new projects approved by the Steering Committee and added project resources to project plans).

Senior Financial & Reporting Analyst PMO SVB Financial Group - Santa Clara, CA May 2010 to January 2012 Contractor FTE of Silicon Valley Bank May 2010 to October 2010 Oct. 2010 - Jan. 2012)

Performed project financial analysis and reporting - Served as primary liaison to Corporate Finance (Accounting, A/P, Vendor Management and Financial Planning and Analysis). Converted all Project cash forecast to GAAP forecast for Corporate FP&A and Executive steering committees. Developed a PMO monthly financial forecasting process for all SVB program/ project related budgets. Communicated with Internal audit to provide information on project framework, controls and governance. Monitored project budgets and financial issues to track/report on various portfolios. Assisted the Head of Enterprise PMO establish best practices related to: cost benefit analysis, ROI, and other financial tracking, analysis, and reporting methods/practices. Supported project managers during the Business Case cycle to develop project estimates and preliminary financial forecasts. Financial reporting process improvements - Developed and improved current project financial management tools and processes and worked with the business to develop financial processes that met their requirements. Worked with the Head of Enterprise PMO to develop the Enterprise PMO budget. Maintained and tracked Enterprise PMO budget and liaise with Enterprise-wide business partners. Strengthened the relationship of PMO between finance, accounting and IT Delivery. Selection

Committee: Part of vetting process in selecting enterprise-wide project management SaaS tool: Met with > 5 potential vendors; organized meetings with potential stakeholders (Finance, PMO, Project Managers and Executive Management). Responsible for training and on-boarding all Project Managers on the Financial Planning modules to the PPM tool (Planview). Finance/Budget Manager (Consultant) Pfizer, Inc - San Francisco, CA September 2009 to March 2010 PO Management for Research, Development and Medical Integration Systems: Created all POs for the RDMi integration program, based on approved SOWs and MSP contractors. Expense analysis for RDMi program: Ran periodic financial reports in Business Objects and Computron and reconciled expenses against intended budgets. Updated monthly accruals, forecasts for individual project under 2 large scale programs (Application Rationalization/Site Closures). Project Management/MS-WTPS role: Entered all RDMi project requests for integration program, based on SOWs and other analysis for project, including financials, resources and other tangibles. Program Financial Analyst/Scheduling Analyst (Consultant) Genentech, South - San Francisco, CA August 2007 to January 2009 Managed two large program budgets for an SAP implementation initiative (\$155 million) and Commercial Blueprint (\$120 million), which supported 25 project managers and 40 projects. Met monthly with all Project Managers on forecasts for updates on spending. Analyzed forecast variances and reported the updates to the Program Director. Tracked and reported on actuals/forecast vs. budgets; prepared various reports on project spending, variances, savings. Worked with Program Director to reallocate budget as necessary. Streamlined the entire financial reporting process, for a large SAP implementation Program. Managed all the POs for Blueprint Program; monthly communication with vendor finance to monitor all PO amounts, end dates and liaise with all the project managers on the Commercial Blueprint Program. Created program-wide presentations on Milestone Analysis, Scorecards, Progress Curve analysis, Work Flow analysis, Scheduling and Critical Paths via MS Project, Excel and PowerPoint. Created milestone models to reflect each project's progress and to identify risks. For the Commercial Blueprint Program, managed change requests, served as central point for Development Object Lists and coded updated tasks in the Master Schedule. Created a data model to streamline progress milestones

that was widely used in both the SAP Implementation program and Commercial Blueprint program.

Education BS in Finance University of Maryland - College Park, MD Skills Hyperion, Oracle, Peoplesoft, Sap, Cognos, Tableau, Workday, Planview, Ariba, Idms, Ms office, Essbase, Excel, Outlook, Powerpoint, Word Links <http://www.linkedin.com/in/jeffreywtan> Additional Information

COMPUTER/SYSTEMS SKILLS: MS Office (Excel, PowerPoint, Word, Outlook), Oracle, SAP, Peoplesoft, Workday, CA Clarity, Planview, Essbase, Hyperion, Business Objects, Cognos, TM1, Tableau, Ariba, IBM - RTC, Apptio, IDMs, HP - QC, HP - PPM.

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