

# MICHAEL MARKMAN, CPA, MBA

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## EXECUTIVE SUMMARY

Finance and operations transformation executive with 20+ years across private equity, CRO, and enterprise environments. Architect of automation and analytics programs that modernize global finance and operational processes, reduce costs, and improve decision velocity. Proven ability to build and lead global teams, deliver \$10M+ annual savings, and align strategy, systems, and reporting for C-suite execution.

**Core Expertise:** Finance Transformation • Global Shared Services • Operations Analytics • Process Mining • Automation COEs • Forecasting & Reporting • M&A Integration • SOX & US GAAP

## PROFESSIONAL EXPERIENCE

### MARKMAN GROUP, RALEIGH, NC

May 2024 – Present

#### Partner, Data & Operations Transformation

*Founded a consulting and analytics firm delivering enterprise-grade data automation and reporting platforms for CFO organizations.*

- Architected proposal automation platform for agritech company, integrating CRM data with product catalogs, labor cost tracking, and customer management to reduce cycle time from days to hours
- Built cloud-based operations dashboards using Alteryx, Power BI, and Python for real-time KPI monitoring, cash flow analysis, and variance reporting
- Led ESG and operational reporting modernization for middle-market PE portfolio company, reducing manual reporting cycles by 80%
- Delivered current state assessment for private credit firm, documenting organizational structure, reporting workflows, cross-functional dependencies, and data infrastructure to inform transformation roadmap
- Managed delivery teams spanning project management, data engineering, and visualization to deploy analytics environments for executive clients

### IQVIA, RALEIGH, NC

Apr 2017 – May 2024 (7 years)

*Global CRO and data-driven healthcare leader (~\$13B revenue). Progressed through three senior finance and operations leadership roles: Global Controller for clinical trials JV (2017-2018), Head of Global Financial Shared Services leading 270-person organization (2019-2022), and VP of Enterprise Data & Analytics driving operations transformation (2022-2024).*

**VP, Enterprise Data & Analytics (Operations)**

Sep 2022 – May 2024

*Led Enterprise Data & Analytics organization within Operations, expanding automation Center of Excellence into cross-functional data and performance function. Reported to EVP Global Technology & Operations.*

- Built enterprise operations data platform and process mining capabilities using Celonis, Alteryx, and Power BI to improve cycle times in billing, collections, and service delivery
- Partnered with regional leaders to embed automation and analytics into operational planning and performance management
- Delivered governance framework for enterprise data quality and reporting standards, reducing manual reconciliation time by 50% and enabling real-time KPI visibility
- Scaled analytics infrastructure reducing ad-hoc reporting requests by 70% through self-service capabilities

**VP, Head of Global Financial Shared Services**

Jan 2019 – Sep 2022

*Led 270-person global organization across AP, AR, payroll, T&E, tax, and close operations in 100+ countries.*

- Achieved \$10M (40%) annualized cost savings and 31% net headcount reduction (120 FTEs) while expanding service scope and improving quality metrics
- Founded Centers of Excellence for Celonis (process mining), Tableau (analytics), Alteryx (ETL/automation), Python (data engineering), and Microsoft Power Platform
- Established first-in-function process mining capability using Celonis to identify \$2M+ in additional process optimization opportunities
- Implemented RPA bots eliminating 10,000+ hours of manual data entry annually
- Served as primary CAO backup for US GAAP/SOX compliance; supported M&A finance due diligence and integration workstreams

**Global Controller – Q<sup>2</sup> Solutions (IQVIA/Quest JV)**

Apr 2017 – Dec 2018

*Oversaw all accounting operations and reporting for joint venture between IQVIA and Quest Diagnostics providing laboratory services for clinical trials.*

- Managed global accounting operations ensuring compliance with both parent company requirements and regulatory standards
- Implemented controls and processes supporting rapid growth while maintaining accuracy and timely financial close

**SIGULER GUFF & COMPANY, NEW YORK, NY**

May 2013 – Apr 2017

**Vice President – Corporate Controller**

*Directed all accounting and financial operations for \$11B AUM private equity firm with eight international offices. Supervised 10-person global finance team.*

- Transformed monthly close process reducing cycle time from 15 to 7 business days
- Led implementation of Concur expense platform cutting processing time by 50%
- Managed complex financial operations including consolidations, GAAP compliance, SOX audits, and broker-dealer regulatory reporting

**KOHLBERG KRAVIS ROBERTS (KKR), NEW YORK, NY**

Apr 2010 – May 2013

**Manager – Management Company / Financial Planning & Analysis**

*Founding team member of the FP&A group that assisted in the development of a consolidated Firm operating plan that set high-level Firm-wide goals, provided analysis of performance and highlighted key takeaways for future planning.*

- Co-designed and implemented SAP financial platform serving as new system of record for global operations
- Built competitive benchmarking framework tracking 30+ global business lines against internal and external metrics
- Overhauled quarterly close process to meet public company standards following IPO, improving efficiency by 30%

**ERNST & YOUNG LLP, NEW YORK, NY**

Aug 2005 – Apr 2010

**Senior Accountant – Financial Services Office**

*Financial services specialist in investment banking and private equity advisory. Notable engagements: Apollo Global Management, Bank of America/Merrill Lynch Merger, Bear Stearns Liquidation, UBS Investment Bank, National Australian Bank.*

**EDUCATION**

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**Master of Business Administration (MBA)** | Columbia Business School | 2013-2015 | Dean's List**Bachelor of Science: Accounting (CPA track) & Finance** | Syracuse University - Whitman School of Management | 2001-2005 | Dean's List, Beta Alpha Psi**Certified Public Accountant (CPA)** | New York State | Active**TECHNOLOGY**

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**Advisory Board Memberships:** Alteryx Visionary Board, AppZen Customer Advisory Board**Technology Expertise:****Analytics & Automation:** Alteryx, Tableau, Python, Celonis, Power BI, Microsoft Power Platform**RPA & AI:** AssistEdge, Automation Anywhere, AppZen**ERP & Financial Systems:** SAP, PeopleSoft Financials, Microsoft Dynamics GP, NetSuite, QuickBooks