

# Michael Markman, CPA, MBA

Raleigh, NC • Phone 914-419-6783 • [michaelKmarkman@gmail.com](mailto:michaelKmarkman@gmail.com)

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## EXECUTIVE SUMMARY

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Finance and operations transformation executive with 20+ years' experience 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

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### Markman Group, Raleigh, NC Partner, Data & Operations Transformation

May 2024 - Present

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

- Designed and implemented 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 real-time KPI monitoring, cash flow analysis, and variance reporting
- Led 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 VP, Enterprise Data & Analytics Sep 2022 – May 2024

Apr 2017 – May 2024

Led Enterprise Data & Analytics organization within Operations, expanding automation Center of Excellence into cross-functional data and performance functions.

- Built enterprise operations data platform and process mining capabilities 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

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## **VP, Head of Global Financial Shared Services (IQVIA)**

Jan 2019 – Sep 2022

Led 400-person global organization across AP, AR, payroll, T&E, tax, and close operations in 100+ countries.

- Achieved \$10M (40%) annualized cost savings and 30% net headcount reduction 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 to identify \$2M+ in additional process optimization opportunities
- Implemented advanced automation capabilities 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.

- Led global accounting teams to ensure full compliance with IQVIA and Quest Diagnostics policies and all regulatory requirements
- Designed and implemented scalable controls and processes that supported rapid expansion while delivering accurate, on-time monthly closes
- Spearheaded initiative that eliminated \$10M+ in parent-company debt, enabling record distributions and dividends to both JV partners

## **Siguler Guff & Co., New York, NY** ***Vice President – Corporate Controller***

May 2013 – Apr 2017

Directed all accounting and financial operations for \$11B AUM private equity firm with eight international offices.

- Transformed monthly close process reducing cycle time from 15 to 5 business days
- Managed complex financial operations including consolidations, GAAP compliance, SOX audits, and broker-dealer regulatory reporting

## **Kohlberg Kravis Roberts (KKR), New York, NY** ***Management Company / Financial Planning & Analysis***

Apr 2010 – May 2013

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 global business lines against internal and external metrics
- Overhauled quarterly close process to meet public company standards following IPO, improving efficiency by 30%

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**Ernst & Young LLP, New York, NY**

Aug 2005 – Apr 2010

***Financial Services Office / Assurance Advisory Services***

Financial services specialist in investment banking audits 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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- **Columbia Business School** | Master of Business Administration (MBA) | 2013-2015 | Dean's List
- **Syracuse University - Whitman School of Management** | Bachelor of Science: Accounting (CPA track) & Finance | 2001-2005 | Dean's List, Beta Alpha Psi
- **Certified Public Accountant (CPA)** | New York State | License #: 097571

## TECHNOLOGY

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- **Advisory Board Memberships:** Alteryx Visionary Board, AppZen Customer Advisory Board
- **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