

MATT PHILLIPY, CPA

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Youtube: <https://www.youtube.com/user/mdss98108>

Tableau Public: <https://public.tableau.com/profile/matt.phillipy#!/>

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IT CERTIFICATION EXAMS PASSED: **#1:** Microsoft 70-461 Querying with SQL (Nov 2016);
#2: Microsoft 70-462 Administering SQL Server Databases (Feb 2017); **#3:** Tableau Desktop 10 Qualified Associate (June 2017)

PROFESSIONAL EXPERIENCE

PAC WORLDWIDE CORPORATION (“pack”) • www.PAC.com Redmond, WA • Dec 2004 - Aug 2016

Global manufacturer of protective packaging products and systems, with annual revenues of \$160 million and 750 FTEs. Manufacturing facilities located in Ohio, Phoenix, Mexico, and Malaysia. Corporate HQ in Redmond, WA. Key packaging solutions supplier for Amazon, UPS, FEDEX, 3M, HSN, United States Postal Service.

Director of Business Intelligence & Finance: Started as Corporate Controller in December 2004 (\$60 million in sales and 250 FTEs) and finished in August 2016 (\$160 million in sales and 750 FTEs), with overall responsibility for **global business intelligence platform**, supporting executive team, sales & marketing, production, supply chain, warehousing, finance & accounting, and HR. As well as overall responsibility for **global finance & accounting operations team**, including financial reporting, treasury, financial planning & analysis (FP&A), and tax compliance. Total of 20+ direct/indirect reports.

Strategy:

- **Revenue Growth:** Build sales analytics/dashboards for executives and sales management to support successful achievement of 15% annual sales growth target. Built company’s E-commerce site in 2012.
- **Profitability:** Team leader for “PAC2020”, a company wide initiative to improve profitability by helping the company become “Automated, Digital, and Data-driven”. I recruited a team of 8 managers in different departments (sales, operations, finance, IT) to create a mission statement and execute on an operations plan to recruit, train, and develop employees with digital skill sets.
- **Long-term Planning:** Developed an automated rolling 36 month demand forecasting model to forecast revenues, machine capacity, CAPEX, raw materials, and labor requirements.

Business Intelligence Results:

- **Microsoft Power BI:** In 2015 led adoption of Power BI / Excel Power Pivot for operations in 3 countries. As part of rollout, I took a team of 8 people to 3 different conferences to obtain Power BI training and learn data visualization best practices - [Professional Association of SQL Server \(PASS\) \(Oct 2015\)](#), [Microsoft Data Conference \(March 2016\)](#) and [PASS Business Analytics \(May 2016\)](#)
- **Microsoft Tabular Data Models (Power BI, Excel Power Pivot, SSAS) and Disparate Data Sources:** 2,000+ hours experience automating data workflows by developing MS tabular data models used for sales analytics, demand forecasting, manufacturing & supply chain analytics, and finance operations. Expert with DAX language and ETL from multiple data sources (relational databases, flat files, xml, Hadoop and Apache Spark clusters).
- **Microsoft SQL Server Database Development for Reporting Workloads:** Architecture and development of databases to offload reporting workloads from OLTP databases to OLAP databases, including use of transaction replication and data marts/warehouse.
- **SQL Querying Language:** 10+ years writing SQL queries and query tuning/optimization

Global Finance & Accounting Results:

- **Cost Reduction:** \$500,000 annual material savings due to implementation of new standard costing system (2015)
- **Forecasting:** 90% reduction in time to prepare short/long term forecasts by building automated scalable models using Excel PowerPivot (2015)
- **Financial Reporting:** For period 2004-2016, 30 unqualified audit opinions on our financial statements, - 11 (Consolidated/US sub, Clark Nuber), 11 (Mexico, Deloitte & Touche), 8 Malaysia (Grant Thornton)
- **Treasury Operations** - \$140M in annual cash disbursements out of bank accounts in the US, Mexico, and Malaysia. \$0 losses due to unauthorized disbursement in 11 years.
- **Customer Credit:** 99.9% collection rate for global customer credit operations. 500+ active customers located in 10 countries. Collection on 60,000 invoices annually (2015)

KPMG • Seattle, WA & Tampa, FL • Jan 2000-Aug 2002 and Dec 2003-Dec 2004 (left KPMG for 1 year to work at Washington Mutual Bank, Sep 2002-Dec 2003)

Audit Senior Associate: Plan, perform, and complete financial statement audits for public (IPO S-1, 10-K, and 10-Q)) and non-public clients. Public company audit clients included HouseValues (IPO, S-1), Publix Supermarkets (Lakeland, FL), and Pacific Aerospace (Wenatchee, WA). Non-public engagements - Seattle Seahawks, Savers (parent of Value Village), CareMedic Systems (health care software, St. Petersburg, FL), Private Capital Management (investment management, Naples, FL).

WASHINGTON MUTUAL BANK • Seattle, WA • Sept 2002 - Nov 2003 (left KPMG for 1 year to work at WAMU, Sep 2002-Dec 2003)

Audit Associate: Plan, perform and lead audits related to treasury and mortgage banking.

KPMG TAIWAN • Taipei, Taiwan • February 1997 - 1999

English Editor: Copy editor for English language reports

EDUCATION • Bachelor of Science in Accounting • University of Montana • 1996

UW CERTIFICATE PROGRAMS COMPLETED

Cloud Data Management & Analytics, Data Visualization (both completed Aug 2016), each program is 180 hours of in-class lecture / labs / homework / capstone projects

BUSINESS INTELLIGENCE CONFERENCES ATTENDED:

- [Spark Summit 2017](#) “Data Science and Engineering at Scale”, San Francisco (June 2017)
- [Strata & Hadoop World 2017:](#), San Jose (March 2017)
- [PASS Business Analytics](#), San Jose (May 2016)
- [Microsoft Data Insights](#), Bellevue (March 2016)
- [Professional Association of SQL Server \(PASS\) Summit](#), Seattle (October 2015)

YouTube Content - Matt Phillipy

Amazon Web Services (AWS)

[AWS EC2 Virtual Machine w/ Hortonworks Demo Kit](#)

[AWS EMR Spark, S3 Storage, Zeppelin Notebook](#)

[Tableau Data Connector: AWS EMR Hive](#)

[Tableau Data Connector: Amazon Redshift \(MPP\) Data Warehouse w/ SQL Workbench](#)

[Tableau Data Connector: Amazon Aurora w/ MySQL Workbench](#)

[Tableau Data Connector: Hortonworks Hadoop Hive on AWS EC2](#)

[Tableau Data Connector: PostgreSQL w/ AWS USASpending.gov dataset](#)

[Tableau Data Connector: Amazon Athena](#)

Microsoft Azure and SQL Server:

[Azure Virtual Machine w/ Hortonworks Sandbox](#)

[Azure: HDInsight Spark, Azure Blob Storage & Data Lake, Zeppelin Notebook](#)

[Power BI Data Connector: Azure Data Lake Store](#)

[Power BI Data Connector: SQL Server Database on Azure VM](#)

[Tableau Data Connector: Azure SQL Data Warehouse w/ Polybase](#)

[Tableau Data Connector: Microsoft SQL Server w/ SQL Server Management Studio](#)

Microsoft Power BI Data Connectors:

[Power BI Data Connector: Azure Data Lake Store](#)

[Power BI Data Connector: Azure HDInsight Spark w/ Zeppelin & Jupyter notebooks](#)

[Power BI Data Connector: SQL Server Database on Azure VM](#)

[Power BI Data Connector: Azure SQL Datawarehouse \(MPP\) with Polybase](#)

Tableau Data Connectors:

[Tableau Data Connector: Amazon Athena](#)

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[Tableau Data Connector: Azure SQL Data Warehouse w/ Polybase](#)

[Tableau Data Connector: AWS EMR Hive](#)

[Tableau Data Connector: Google BigQuery Data Warehouse](#)

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