OVERVIEW OF QUALIFICATIONS

Mr. Daniel Fink is currently an independent consultant with more than 15 years of experience in project management, business analysis, testing, consulting, operations management, process re-engineering, curriculum development, and training. His functional industry experience includes: retail, distribution, software, manufacturing, healthcare, food service, public sector, utility, pharmacy, video game, publishing, semi-conductor.

Over the past years he has worked extensively with ERP, OMS, WMS and MES applications including designing and implementing applications, interfaces and customizations. He is primarily a project manager (Agile and Waterfall) and functional business analyst resource and has extensive experience with the Order to Cash, Procure to Pay (Source to Settle), Plan to Produce, Design to Deploy and Manage Inventory business cycles.

EXPERIENCE

For the Santa Clara Valley Water District, as an independent consultant, he was Sr. SCM Business Analyst- July 2015 to Current.

* Sr. Supply Chain Business Analyst for the PeopleSoft 9.2 (ERP) Upgrade Project, leading the Source to Settle and Inventory Control processes. Scope As-Is processes, collect requirements and perform Fit-Gap analysis. Design business process improvements. Prepare to implement Supplier Contract Management, Strategic Sourcing, eProcurement, Services Procurement (sPro), and Mobile Inventory modules for PeopleSoft ERP v9.2. Prepare to upgrade Purchasing, Accounts Payables and Inventory modules. Delivered demos and training in PS v9.2. Delivered As-Is process maps and process opportunity analysis. Delivered business requirements across all supply chain and inventory processes. Delivered fit-gap, gap analysis, and future process maps. Delivered project plans/schedules, implementation options and resource requirements.

For Mighty Leaf Tea, as an independent consultant, he was Project Manager/SCM Business Analyst- March 2015 to July 2015.

* Project Manager and Supply Chain Business Analyst for Order to Cash and Inventory Control projects. Manage project for new EDI interface to 3PL warehouse using 940-945 transactions. Deliverables included as-is analysis for Retail, Direct to Consumer, Wholesale and International channel Order Fulfillment processes. Produced and maintained project plans, budgets, requirements, design, and fit-gap documents; test strategy and test plans/use cases; status meetings and presentation materials. Direct management and coordination of internal and external consulting teams. Applied Agile style SDLC methodology. Performed as-is analysis of inventory control interfaces and processes with 3PL warehouse. Delivered policy and procedure documents.

For Bare Escentuals, as an independent consultant, he was Project Manager/SCM Business Analyst- March 2014 to January 2015.

* Project Manager for SCM Releases 1 and 2 for the ERP/eCommerce systems; Distribution Center Releases 1 and 2 for the WMS system. Business Analyst for Retail and Replenishment improvements. Business Analyst/Project Manager for Advanced Planning Systems implementation project (Oracle ASCP). Applied Waterfall and Agile style project management. Managed multiple projects concurrently including internal and external resources. Deliverables included Project Plans, Resource Estimates, Budgets, Capacity Planning, Weekly communications and status meetings, Statements of Work, Capital Authorization Requests, Power Point presentations for Steering Committees and business operations. Contributor for Inventory Accounting ERP project.

For Ascension Health, as an independent consultant, he was PeopleSoft SCM Business Analyst- Jan 2014 to Feb 2014.

* Working as a subcontractor of Accenture, he was part of the pre-deployment teams for implementing PeopleSoft Supply Chain and Financials in multiple hospitals. Specific features included Par Replenishment, Perpetual Inventory Management for Storerooms, Operating Rooms and various departments and At Par Hand Held applications.

For Nights Publications, as an independent consultant, he was Project Manager/Business Analyst- Sept 2013 to Dec 2013.

* Leader of a Business Process Improvement project for international company to redesign operations and eCommerce systems in an environment of increased business scope and reduced staffing and resources. Created process mapping, operational metrics. Analyzed results using TOC and ABC Costing methods. Designed and implemented new processes including staffing. Scope included design to deploy, procure to pay and supply chain/inventory management areas. Deliverables included project plan, budget, cross functional process maps, job aids, policies and procedures, operational dashboard.

For Lucille Packard Children's Hospital (Stanford), as an independent consultant, he was Sr. Supply Chain Business Analyst- Jan 2013 to Aug 2013.

* Part of the ERP Project supporting Inventory, Purchasing and Mobile Inventory processes. Key member for approval of designs, testing, training, deployment and production support. Lead for integration of Mobile Device Management (MDM) software (SOTI) and bar code label design and Printers (Bar Tender). Specific solution included interfaces to Legacy WMS, VMI replenishment in a JIT environment, Par Replenishment, Sourcing, Handheld Devices, Electronic workflow approvals (MIN, EPRO, PO, IN).

For Kaiser Permanente, as an independent consultant, he was part of the OneLink Project (NCAL Materials, SoCal Materials, SoCal Pharmacy and ROCS W2) implementations. March-2010 to Nov 2012.

* Part of the OneLink Materials (hospital) projects supporting Inventory and Purchasing processes at multiple sites in Northern CA, Southern CA and Northwest region. Team lead (Project Manager) for Inventory, Cost Accounting and Finance issues. Lead for testing (performance and UAT). Site Deployment Lead (Project Manager) for Livermore Regional Distribution center and North Bay (San Rafael) facilities. Site Deployment Lead for Northwest region hospital and MOBs. Resolve system issues, provide training and documentation, and support daily operations to ensure throughput and data accuracy. Specific features include Interface to WMS, Replenishment, Cart Replenishment, Warehouse Distribution, Hand-held devices (IN, PO).
* Part of the deployment team for the Pharmacy project supporting Inventory and Purchasing users/processes at the Central Warehouse/Central Refill Pharmacy sites. Resolve issues, provide training and documentation, UAT testing; support daily operations to ensure throughput and data accuracy. Specific features include interfaces to WMS, PIMS and prescription refill systems, custom replenishment and requisition processes (IN, PO).

For 3M, as an independent consultant, he performed an assessment of their ERP integrated supply chain and financials solution for manufacturing and distribution. Jan 2010 to March 2010.

* Evaluated Order to Cash and Plan to Produce solution (1600 business units with interfaces to WMS, 3PL and MES systems). Recommended system performance and process improvements to increase daily business and system throughput. Worked across OM, BI, IN, PO, MFG, and CM modules and multiple modifications and interfaces.

For Ubisoft, as an independent consultant, he was Supply Chain lead for Order to Cash and Inventory Management processes for the PSv9 Re-implementation Project. February-2008 to December 2009.

* Re-design and re-implement Order Fulfillment and Allocation system and business processes in an international wholesale/retail distribution environment. Large volume EDI interfaces from customers (i.e. Wal-Mart) and to WMS systems at 3rd Party Logistics and Manufacturing partners. Implemented heavily customized OM, IN, BI modules with cross work in PO, MFG, CM, SP. Deliverables included As-Is analysis, Fit-Gap, scope, design and configuration documents, UPK procedure documents, and reports.

Project design highlights (with supply chain team) include:

* Custom Allocation Workbench modeling and execution tool for JIT environment
* Configurable EDI interfaces and data/business rule validations with built in audit for BPI metrics (850, 940, 945, 856, 861, 180).
* Custom Mass Maintenance tools for Order to Cash.
* Custom consignment and inter-company solutions
* Enterprise Pricer solution.
* Custom costing solution for “actual dating” of EDI processes.
* Adaptation of tools and processes to media Street Date, multi-sku orders in a true JIT environment.
* Interface for E-commerce Billing.

For Dolby Laboratories, as an independent consultant, he was the Project Manager and Business Analyst for the Quote to Cash-Sales Tax Project. March-2007 to December 2007.

* Manage project to redesign Quote to Cash processes and integrate Vertex tax software with PeopleSoft Billing, eCommerce and other legacy systems. Managed configuration of tax software to reflect customer and product rules. Designed new order and invoice interface between legacy systems and PeopleSoft. Managed team of in house staff and external consultants. Deliverables include scope documents, project plans, budget, configuration documents, procedure documents, and reports. BI, OM, PO modules.

For Bare Escentuals, as an independent consultant, he was the Project Manager for Business Process Improvement (BPI). February-2006 to February-2007

* Working for the CFO and President, focused on cross functional operations for Product Development, Direct to Consumer, Planning and Production departments. Evaluated existing processes and recommended changes in systems, structure, steps, and metrics to improve throughput, coordination and project success. Deliverables included: communications plans, project plans, process maps, new process step definitions, project management systems and templates; company wide assessment of projects, tasks and resources.

For Fairchild Semiconductor, as an independent consultant, he was the Functional Lead for Manufacturing and Inventory. February-2004 to December-2005

* Phase III functional team member for major PeopleSoft upgrade. Perform Fit-Gap in detail against current systems, interfaces and processes. Design modifications in support of Design to Deploy and Plan to Produce processes (MFG, CM, IN). Create functional specifications, create DB configuration, create procedure documents and test plans for Inventory and Manufacturing teams. Design use of new PeopleSoft features and interfaces to other systems. Conduct workshops and training. Coordinate results with Cost Management and Distribution teams. Configure demo and development databases including sample data (IN, BR, CM, PM). Perform Q/A of configurations throughout the migration path. Test standard and modified processes for both Manufacturing and Inventory teams.

For 2WIRE.com, as an independent consultant, he was the Project Manager and Functional Lead for Manufacturing, Distribution and Financials applications. October –December 2003

* Manage project to create and support new in-house distribution center. Design new business and system processes to support order fulfillment and manufacturing processes (OM, IN, MFG, CM, BI). Reconfigure system; perform testing and training of 3 tiers of support staff. Perform Q/A audit of new product structure, costing model and account distribution in support of new business model. Deliverables include project plan, configuration documents; policies and procedure documents.

For Verizon Wireless, as an independent consultant, he was Integration Testing Coordinator. July-September 2003

* Team member for PeopleSoft upgrade to release 8.4. Responsible for conducting testing team meetings; managing and escalating issues across national teams of functional leads, project managers and testing resources. Managed all test scripts, plans and project schedule for unit, integration and user acceptance testing (PO, AP, IN). Assist project management team in rescheduling macro project plan for revised Go Live date. Interface with Deloitte Consulting and Accenture consultant teams.

For Harcourt Publishing, as an independent consultant, he was Functional Lead for Manufacturing and Cost Management applications. January-April 2003

* Team member for PeopleSoft upgrade to release 8.4. Lead for scope and design phases of manufacturing and costing modules (BR, CM, PM, IN, PO, BI). Deliverables included scope and design documents, design of interfaces to legacy systems and configured cost and manufacturing solution. Interfaced with Price Waterhouse/Coopers consultants and in-house staff.

For 2WIRE.com, as an independent consultant, he was the Project Manager and Functional Lead for Manufacturing, Distribution and Financials applications. January -August 2002

* Responsible for PeopleSoft upgrade project, and implementation of manufacturing modules (MFG, CM, IN). Implemented additional standard functionality (OM, BI, PO, AP, GL) and customizations (IN, PO, PM) to support in house and external fulfillment models (including Auto-Ship, Auto-Invoice and Auto-Manufacturing). Completed data cleanup, synchronization of Inventory tables, costing model changes and elimination of serial control. Re-engineered monthly close and reconciliation processes. Managed team of consultants and in-house staff.

For The SAK Elliott Lucca, as an independent consultant, he was Vice President of Information Technology (Interim). September-December 2001

• Responsible for supporting a variety of IT projects including PeopleSoft upgrades, creating strategic plans and budgets, scoping new eCommerce and Point of Sale-Replenishment systems, IT Recruiting, upgrading email systems, implementing disaster recovery procedures and designing customizations for PeopleSoft distribution modules.

For Virologic, as an independent consultant, he was Functional Lead for PeopleSoft Distribution and Financials. July-November 2001

• Responsible for supporting the PeopleSoft implementation for multiple business units (GL, AP, PO, IN). Highlights include resolving multiple high priority production issues, designing and testing Replenishment modifications and interfaces, implementing PO Contracts, scoping bar code interfaces, and delivering training for PO and IN. Interface with PeopleSoft’s and Ballantyne Inc. consultants.

For SERTA Inc. as an independent consultant, he was Project Manager and Functional Lead for Manufacturing, Distribution and Financials. October 2000-August 2001

• Responsible for supporting the PeopleSoft implementation project for three manufacturing business units as well as their corporate headquarters and operations center (GL, BI, AR, AP, PO, IN, OM, PM, BR, CM). Manage inside staff and outside consultants. Deliverables include project plans, budgets, scope documents, implementation methodology, system configuration, system testing, procedure documents, training and production support. Project included resolution of application and design issues in the Manufacturing, Distribution and Financials modules as well as an upgrade to 7.53. Interface with PeopleSoft’s consultants.

For The Sak he held the position of Senior Director of Operations and provided ongoing support as an independent consultant. March-October 2000

• Responsible for managing the IS/IT department including PeopleSoft Implementations (GL, BI, AR, AP, PO, IN, OM), Web Application Development and Support and Retail Star POS System. Direct reports include inside staff and outside consultants. Deliverables include project plans, budgets, scope documents, implementation methodology, system configuration, system testing, procedure documents, training and production support. Highlights include:

* Stabilized production and development environments for PeopleSoft and Web applications.
* Completed PeopleSoft implementation for 2 main business units.
* Produced Financial statements after reconciling one year of production data.
* Created Demand/Supply balancing tools and reports.
* Created major modifications for Purchasing and Logistics.
* Reconfigured OM, BI, AR, IN, PO setup in support of new and revised business processes.

• Responsible for leading Business Process Improvement (BPI) re-engineering project. Introduce and train directors and managers on BPI Methodology. Define and collect metrics for Quote to Cash, Procure to Pay, Plan to Produce and Design to Deploy business cycles. Map current and future business processes, facilitate process analysis and improvement efforts. Highlights include:

* Increased throughput of Order Fulfillment processes.
* Reduced charge backs by corporate customers.
* Reorganized product data management duties.
* Reengineered Quote to Cash, Design to Deploy and Procure to Pay processes.

For TSC he held the position of Senior Consultant. March 1999 to March 2000

* As a senior consultant, he completed various assignments and projects.

• Assigned to NEC Packard Bell in Angers, France as Quote to Cash lead to provide scoping and implementation support for PeopleSoft’s Order Management and Inventory as well as design and development support for integration to Firepond’s Web CRM and eCommerce tool. Interfaced directly with technical and functional teams from multiple consulting firms (PeopleSoft, Firepond, Price Waterhouse/Coopers), and end users, to identify, resolve and document issues. Deliverables include project plans, modification specifications, interface design and configured databases.

• Assigned to Polycom in San Jose, CA, to resolve key inventory and supply chain issues and advise on product configuration on an “as needed” basis for Peoplesoft’s Enterprise Planning, Engineering, Order Management and Inventory. Interface directly with other functional and technical leads and client project team.

For PeopleSoft Inc., he held two positions. January 1997 to March 1999

– As a senior consultant, he completed various projects.

• As a manufacturing bootcamp instructor for PeopleSoft University, he delivered two week accelerated courses for PeopleSoft ERP consultants. Products included: Bills and Routings, Engineering, Production Management, Production Planning, Inventory, Cost Management, Order Management, and Purchasing products.

• Assigned to NEC-Packard Bell in Angers, France, to provide Phase I production support for Production Management including integration issues and additional support for Inventory, Production Planning, Costing, Engineering and Product Configurator modules.

• Assigned to NEC-Packard Bell in France, to provide Phase II design, gap analysis, and implementation support for the Engineering department. Project included integration between PeopleSoft Engineering to other PeopleSoft manufacturing products and design of an interface to a third party PDM product (Agile). Provided similar design and scope for Phase I in March 1998.

– As a senior curriculum developer, he was a member of the Manufacturing/Distribution curriculum team with Corporate Education Services. Responsible for the development/delivery of application education for Engineering and Production Management. Taught manufacturing courses for PSG Bootcamps and PeopleSoft University. Delivered internal curriculum development courses. Students included team members from NEC/Packard Bell, The United States Mint, NUMMI, Titliest, Mitsubishi, Accenture, Deloitte, KPMG, Ernst & Young and PWC and Technology Solutions Company.

For Boyd Company, he was Director of Operations. January 1991 to December 1996

– Responsible for strategic planning. Managed the day-to-day US operations. Responsible for functional design of ERP/MRP installation including Inventory Mgmt, Product Data Management, Manufacturing, Engineering and Costing modules. Project Manager for continuous improvement program. Managed M.I.S., Purchasing and Production and Distribution departments. Responsible for all product costing, pricing and RFPs for special projects.

KEY TECHNICAL SKILLS

|  |  |
| --- | --- |
| Applications | Oracle-PeopleSoft up to release v9.2 (Inventory, Mobile Inventory, Purchasing, Supplier Contract Management, Strategic Sourcing, Services Procurement, Order Management, Manufacturing, Engineering, Cost Management, eProcurement, Production Planning, Billing, Accounts Payable, Application Designer, Query, UPK, Security Administrator). |
| Methodologies: | SDLC, AGILE, TOC (Theory of Constraints), FKA Curriculum Development, Activity Based (ABC) Costing |
| Other: | SQL, WinRunner, TOAD, Oracle UPK, Test Director, Word, Excel, Power Point, Project, Visio, Documentum, AGILE (PDM), Cam Data-Retail Star, Vertex, Sterling (OMS and EDI), Mapics, Kisoft, SOTI, Bar Tender, GHX (EDI software), Sharepoint, Sage-Mas500, True Commerce (EDI), High Jump |

EDUCATION / OTHER

Mr. Fink attended Berklee College in Boston and University of California-Berkeley. Other professional training includes APICS (Supply Chain), American Mgmt Association (Activity Based Costing), IBM, and Friedsen Kayes Associates (curriculum design). In addition, he has received extensive technical training at Oracle and PeopleSoft).