

## \*FINANCE EXECUTIVE\*

*Drive Finance & Business Performances into Competitive Advantages for Healthcare & Insurance Providers through Vision and Revenue-Generating Operational Leadership*

Dynamic executive leadership career in international, billion dollar organizations with a rich mix of finance, operations, internal/external processes, technical savvy and business development. Intimate knowledge of financial processes, operating results and profitability. Expert in executing team-driven process improvements to increase revenue growth operational efficiency, and overall profitability. Executive MBA. Expertise in:

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| <input checked="" type="checkbox"/> Financial & Procurement Controls             | <input checked="" type="checkbox"/> International Sourcing, Operations & Finance |
| <input checked="" type="checkbox"/> Contract Negotiations & Procurement Controls | <input checked="" type="checkbox"/> Technology & Process Implementation          |
| <input checked="" type="checkbox"/> Strategic & Financial Planning               | <input checked="" type="checkbox"/> Start Ups, Turnaround & Revitalization       |

## EXPERIENCE & ACCOMPLISHMENTS

ROCK INSURANCE OF CALIFORNIA, San Francisco, CA 2007 to Present  
*HMO provider with annual revenues of \$4 billion and over 3,000 employees.*

### Director of Finance & Vendor Management

Promoted to the CFO role for the finance and vendor management function of the Rock Design Program, a \$500 million infrastructure redesign program focused on claims, portals, product and IT infrastructure support. Created strategic plans to improve profitability and a tool to monitor benefits realization. Direct and develop financial models, space and capacity planning, and supplier rationalization and vendor plans to ensure performance indicators. Supervise 16 staff in 4 departments. Present regularly to corporate CFO and CEO on financial progress of program.

#### ENTERPRISE IMPACT:

- Created and divided the organization into a two-phased restructuring approach—1<sup>st</sup> phase to centralize the finance/vendor management functions, 2<sup>nd</sup> was to automate key processes to reduced dependency on manual processes and staff positions. **The restructure netted over \$500,000 in annualized savings.**
- **Key member of the program's leadership team** that built out the first business cases and secured funding approval.
- Partner with executive management, business and IT to **develop the annual financial business plan** to gain buy-in.
- **Uncovered over \$12 million in cost saving opportunities** through revision of staffs internal and external resources, negotiating consulting fees, and facilitating substantial business reinvestment.
- **Identified over \$5 million in cost reductions** by implementing a transaction-level accounting reporting system that allows for greater transparency.

GLOBAL UNITED HEALTH, Walnut Creek, CA 2000 to 2007  
*Healthcare provider and health insurance company with annual revenue of \$38 billion and over 150,000 employees.*

### Executive Director, National IT Compliance (2005 to 2007)

Governed all aspects of the \$1.4 billion IT Division that supported all healthcare systems. Partnered with IT leadership and company execs to gain buy-in for new processes and procedures and support program. Supervised 22 staff.

#### ENTERPRISE IMPACT:

- **Met the challenge of turning around the division** to focus on compliance, financial stability, audit integrity and productivity increases. Implemented SOX 404 for IT to include testing over 500 key applications.
- **Saved over \$1 million** while improving audit activities with the Compliance Organization Rebuild Project that redefined positions, creating new processes, and enhanced training.
- Ensured compliance with procurement processes, renegotiated supplier contracts, and analyzer the supplier base which resulted in **over \$5 million in savings.**
- Consolidated audit and remediation activities to support SOX 404 which reduced the need for additional staff and **decreased costs by \$5 million.**
- **Set the precedence for the vendor community** in the Bay Area by aggressively negotiating with vendors to reduce the number of professional services suppliers and **saved \$25 million.**

**Corporate Senior Manager, Finance Shared Services Organization, Buy to Pay (2003 to 2005)**

Promoted as the point person to build the new Shared Services Department of the Finance Shared Services Organization in Corporate Finance that maintained delivery of \$8 billion in transactions. Directed general finance, controllership, and accounting. Utilized Six Sigma initiatives. Served as the Program Finance professional and instilled reporting discipline.

**ENTERPRISE IMPACT:**

- **Drove \$5 million in annual savings** through financial analysis and project planning.
- Mapped out departmental process to transactional activities and set up an activity-based costing framework, saving company over \$5 million.
- **Put into place company's initial SOX 404 program** and reduced financial exposure from poor accounting practices by more than \$25 million.

**Financial Leader, Financial Shared Services & IT Procurement, Hospital IT Division (2002 to 2003)**

Administered a \$70 million departmental budget with 45 staff. Integrated IT procurement, strategic financing, asset management, material management services, vendor managements shared services, human capital resource management and facilities during department restructuring.

**ENTERPRISE IMPACT:**

- Eliminated unneeded projects and combined under-utilized facilities **cutting \$5.25 million from facilities** management.
- **Reduced purchase order exposure from \$90 million to \$5 million** and decreased days outstanding from 100 to 45 after revamping the e-procurement system and processes.
- Saved over \$250,000 annually through centralization of management of more than 400 IT contracts worth \$500 million, which eliminated storage waste and decreased access time.

**Operations Finance Leader, Network Services and Distributed Computing, Hospital Division (2000 to 2002)**

Oversaw finance, accounting, asset management and material services for a \$300 million division. Supervised 18 staff. Piloted department's first capital acquisition and requisition tracking process.

**ENTERPRISE IMPACT:**

- **Eliminated more than \$2 million in capital expenditures** through installation of a new capital order process, centralizing the division's procurement and eliminating duplicate ordering
- Increased cash flow by **\$5 million** by re-evaluating the lease vs. buy strategy of assets.

GOOD NIGHT INTERNATIONAL, Washington, DC

1994 to 2000

*International hotel chain with more than 150,000 employees worldwide and \$25 billion in revenue.*

**Director of Finance, Panama Good Night Hotel, Panama City (1998 to 2000)**

**Controller, El Paso Good Night (1996 to 1998), Senior Assistant Controller, Denver Tech Center Good Night (1996), Assistant Controller, Albuquerque Good Night, New Mexico (1994 to 1995)**

Steady advancement at Good Night due to consistent, performance-driven successes. Promoted to manage the start up in Panama City and all general finance, IT, and accounting. Created business plan and supervised 12 staff.

**ENTERPRISE IMPACT:**

- Collaborated with Sales and Marketing to **increased room revenues \$2 million annually** by revising rate structures and providing special corporate incentives.
- **Negotiated line of credit extendible to 5% of revenues** with local financial institution, allowing the hotel to open even though the owners were only able to secure 7% of their stipulated working capital.

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## EDUCATION & AFFILIATIONS

**Executive MBA**, PEPPERDINE UNIVERSITY, Malibu, CA

**BS, Finance & Business**, University of Texas, El Paso, TX

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**Leadership Board**, Pepperdine Graduate School of Business, *Director of Sponsorships*, Current

**BOD & Interim CFO**, Cetrim, Inc (*start-up biotech firm*), 2007-2008

**BOD**, Local Interest Group in San Francisco for itSMF, 2006