

# LAD D., MBA, PMP

## PROJECT IMPROVEMENT EXPERT

### PROFESSIONAL SUMMARY

Experienced process improvement consultant seeking strategic consulting or program management role, where I can leverage 20+ years of experience to drive results and complete key initiatives. Desire to leverage professional and interpersonal skills and core strengths of relationship development, networking, organization, problem-solving, strategic analysis, stakeholder communication, project management and presentation.

I've managed complex projects and clients in multiple industries and sold solutions at every level.



**maven**  
A people first company

### CONTACT FOR MORE INFORMATION

614-353-3873

### RESULTS

- Savings of \$1.5M+ - Accounting Department re-organization
- Saved \$1M+ annually by leading merger of two lines of business at major bank
- Found, recommended \$12M+ annual savings at major bank via internal process analysis
- Saved \$500K at animal health distributor through improved inventory management
- Increased inventory turns by 25%, saved \$1M+ by fixing returns process at electronics company
- Saved \$10M+ annually by strategic sourcing/negotiations at 2 global manufacturers.
- Realized \$1M+ in annual rebates and incentives by implementing P-Card program at retailer

### SKILLS

- Process Improvement, Thought Leadership
- Selling, Client Management & Satisfaction
- Business Development
- C-Level Presentations
- Contract Negotiation, Closing
- Lead Management
- Project Management (PMP), Agile
- Business Case Creation and Selling
- Accounting / Finance Strategy, Technology
- Supply Chain Strategy, Technology
- RFP / RFI / Bid Preparation
- Sales / Marketing Strategy
- Sales Forecasting / Demand Planning
- SaaS Evaluation & Implementation

### INDUSTRIES

Software, Banking, Professional Services, Manufacturing, Retail, Logistics, Distribution, Healthcare, Energy, Government, Insurance, Chemicals, Real Estate, Automotive, Electronics / Lab Equipment

### EXPERIENCE - CONSULTING

**CROSS COUNTRY MORTGAGE | Columbus, OH** 2021 - Present  
*SalesForce / CRM Admin and Development Team*

- Conducting process improvement analysis of CRM Admin/Dev team, with focus on improving service delivery, internal efficiency, and relationships with other departments
- Created interview guide, interviewed team members to learn all aspects of team, processes
- Developed, presented fact-finding Mid-Point deck that was well received by sponsor
- Segregated Process improvement opportunities for CRM Team into three strategic categories:
  - Delivery Speed / Throughput
  - Transparency / Communications
  - Team Performance (People/Process/Technology)
- Creating action item list, priority planning to address team's concerns
- Presenting findings to team, assembling task forces to execute re-organization and re-design

#### *IT Infrastructure / RPA Initiatives*

- Reviewing RPA Initiatives, prioritization, and rollout
- Supporting VP, Infrastructure in streamlining RPA rollout, expanding automation opportunities

**NiSOURCE INC (Contract via BlueStar Partners) | Columbus, OH** 2018 - 2021

- Managed transition, communication, training and Knowledge Transfer efforts of NiSource Next program (large scale transformation, voluntary separation program)
- Led, sold transitional efforts on behalf of CAO - org strategy, knowledge transfer, work-shadowing, process mapping, staffing, hiring, recruiting (Savings - \$1.5MM/yr)
- Transformed Accounting department to Shared Services / Center of Excellence model
- Managed, navigated recruiting process that hired / transferred 20 Accounting professionals
- Implemented governance model to manage CI initiatives, created Accounting-specific training plan incorporating online and instructor-led training
- Led brainstorming sessions to balance workloads, identify process owners
- Built stakeholder communication plan and "selling" deck to inform company of future state
- Led planning of Real Estate / Facilities Maintenance department merger and exploration of outsourcing opportunities. Pain points included inadequate technology, lack of data for 400+ buildings, and retiring workforce
- Built business case, current / future state org charts, job descriptions and plans for communication, knowledge transfer, and employee transition.
- Created enterprise road maps for SVP to identify major company initiatives
- Led OCM Planning, kicked off projects related to equipment data tracking, management

# LAD D., MBA, PMP

## PROJECT IMPROVEMENT EXPERT

### PROFESSIONAL SUMMARY

Experienced process improvement consultant seeking strategic consulting or program management role, where I can leverage 20+ years of experience to drive results and complete key initiatives. Desire to leverage professional and interpersonal skills and core strengths of relationship development, networking, organization, problem-solving, strategic analysis, stakeholder communication, project management and presentation.

I've managed complex projects and clients in multiple industries and sold solutions at every level.



**maven**  
A people first company

### CONTACT FOR MORE INFORMATION

614-353-3873

### EXPERIENCE - CONSULTING

- WELLS FARGO CAPITAL FINANCE | COLUMBUS, OH 2016|2017**
- Drove, sold key initiatives, business cases for banking client, including:
  - Commercial Services Standardization - Managed consolidation, standardization of two factoring lines of business by merging, improving technology
  - Reconciled policies, procedures, processes, personnel of multiple depts to standardize 2 lines of business
  - Labor Models - Analyzed multi-year staffing levels, created business cases
  - ABL Deal System Transfer - Drove multi-phase initiative to move ABL clients to new system
  - Lockbox Consolidation - Managed 2-year project consolidating unaffiliated lockboxes
  - Legal Entity Rationalization (Living Will) – Closed 4 legal entities overseas, merged 2 others

### EXPERIENCE

- JPMORGAN CHASE | Columbus, OH 2014|2015**  
VP, Strategy & Process Improvement
- Presented recommendations to sr. executive clients in succinct, powerful slides
  - Drove teams of S&PI analysts in CCB division for 10-12-week projects as internal consultant
  - Found \$12M+ annual savings, recommending system, control, customer experience changes
  - Maintained strong relationships with internal clients, scoring 4.9/5.0 on stakeholder surveys
  - Reviewed, documented end-to-end business processes, identifying gaps, risks, inefficiencies

- DEMANTRA INC. | Cambridge, MA 1999|2000**  
Account Manager
- Managed client, relationships for (7) key NA clients using demand planning software
  - Acted as liaison between clients and technical consultants / developers, ensuring functionality met or exceeded client expectations

- CATERPILLAR LOGISTICS SERVICES | Peoria, IL 1997|1999**  
Sr. Account Rep (3PL)
- Led Proposal Development teams to create, present, and sell 3PL solutions to major clients

### CONSULTING ENGAGEMENTS/OTHER ROLES

Client	Role	Year
State of Ohio	PM/Management Consultant – Procurement	2018
St. Elizabeth Healthcare	PM/Management Consultant – Supply Chain	2013-14
Butler-Schein Animal Health	Management Consultant – Supply Chain	2011-13
Cardinal Health	PM/Management Consultant – SAP / Finance	2010-11
Leggett & Platt	Group Director, Logistics & Inventory	2007-09
Mettler-Toledo	Controller, Logistics & Procurement	2006-07
Goodyear	Management Consultant - Procurement	2005-06
Greif	Management Consultant - Procurement	2004-05
Limited Brands Inc.	Consultant/PM - Supply Chain / Procurement	2000-04

### EDUCATION

- THE OHIO STATE UNIVERSITY | COLUMBUS, OH | MBA, FINANCE/SUPPLY CHAIN 1994|1996**  
**THE UNIVERSITY OF TOLEDO | TOLEDO, OH | BA, HISTORY/POLITICAL SCIENCE 1986|1990**

### CERTIFICATIONS

- PMP – Project Management Institute
- CPIM – APICS
- CPM – Institute of Supply Management
- Lean / Six Sigma Black Belt

### SYSTEMS

- Peoplesoft 9.1 Purchasing
- Inventory
- A/P SAP R/3
- E3
- Baan

### SOFTWARE

- Excel / Powerpoint guru
- Sharepoint
- Demantra
- MS Office
- Access
- Visio
- Project
- Ariba