

Professional Summary

Strategic, well-connected leader focused on strengthening organizations, understanding business needs, developing human capital, and increasing results and performance. Results-oriented with strong background in developing strategy, building relationships, managing resources, and implementing change. Recognized for inclusive and collaborative leadership style, proactive approach, and keen ability to effectively translate complex operational concepts into tangible action plans. Proven leader with a strong executive presence, business acumen, consultative, and strategic thinking skills.

Professional Experience

Director-Conferences & Symposiums

November 2019 – Present

Director-Conferences, Symposiums, Finance & Administration

November 2010 – November 2019

Interim Director for Business Development and Sales

December 2014 – March 2017

University of Georgia; Terry College of Business; Office of Executive Programs; Atlanta, Georgia

Cultivates key relationships to direct large scale senior leadership and talent development programs. Establishes financial forecasts and benchmarks for program management and leads process improvement initiatives with internal and external stakeholders to drive change and champion best practices. Advocates inclusion, diversity, and equality by working with administration, faculty, staff, students, and external stakeholders to create harmonious and inclusive work environments.

- Develops relationships to cultivate a public partnership with private and public organizations that supports new opportunities for collaboration and attaining financial goals and objectives
- Promotes and nurtures growth of professional development programs by working with internal and external stakeholders based on market research and assessment of business needs
- Sets vision to align business strategy, develop policies and procedures for revenue growth that supports financial goals
- Led human resources activities for Executive Programs including recruitment and hiring processes, salary classifications and actions, onboarding, performance evaluations, coaching, and employee development;
- Directed general ledger revenues and financial expenditures through PeopleSoft and OneUSG Connect systems and manages opportunities that drive financial savings as part of the planning, consumption, and management of resources
- Led financial planning and budget development, monitors progress, assures adherence, and evaluates performance
- Restructured and directed integration, training, and ongoing support of Client Relationship Management systems to centralize event registrations, financial planning and operations, financial reporting, metrics, and marketing initiatives

Manager, Planning & Analysis

September 2009 – February 2010

Orchard Brands; Athens, Georgia

Directed call center operations to align key performance indicators, financial planning and analysis, and budget goals with strategic objectives and improve customer service levels.

- Developed, managed, and monitored \$10 Million operating budget to support financial strategy, goals, and metrics
- Managed accountant responsible for general ledger accounts and day-to-day accounting and financial operations

Project Manager-Retail Accounting and Operations

May 2006- September 2009

AT&T; Alpharetta, Georgia

Partnered with key stakeholders to design, transform, and optimize financial operations for controllers and cash accounting. Leveraged technology by facilitating process improvement and cost reduction programs to integrate, transform, and standardize global operations across retail, sales, and finance to support national retail footprint.

- Directed 10 accountants and senior accountant to coach, mentor, and lead an effective team that supported financial operations and retail point of sale transactions for over 600 retail locations
- Fostered inclusive and collaborative environment to implement competitive technology solutions and promote process improvement initiatives for financial and accounting operations in support of 2,000 retail stores
- Provided direction and oversight to reduce annual operating costs \$500K by evaluating and negotiating service provider contracts to increase productivity, mitigate risks, and decrease deposit-in-transit for cash vault process
- Analyzed general ledger account structure and led the Bank Changes Project to consolidate retail deposit accounts by 65% for retail store operations and increase productivity for month-end close processes
- Managed external relationships to support retail deposit operations and cash vault processing

Professional Experience

Senior Manager-Trust Operations

May 2001 – April 2006

AT&T; Atlanta, Georgia

Directed ERISA qualified employee benefit plans and financial operations associated with over \$2 Billion in assets under management. Managed complex outsourcing services across trustees, recordkeepers, and investment managers. Designed and prepared presentations for Investment Committee and Board of Director's.

- Led financial operations, planning, and reporting to ensure financial and administrative integrity, complete account reconciliations, manage workflows, and allocate over \$100M expense budget for employee benefit plans and trusts
- Directed operational review meetings with trustees, recordkeepers, and investment managers to implement benchmarking, manage employee benefit plans, investment manager due diligence and portfolio performance, and securities pricing
- Maintained policies and procedures to comply with federal regulations for ERISA qualified benefit plans

Trust Operations Specialist

November 1996 – May 2001

AT&T; Atlanta, Georgia

Managed remote outsourced teams responsible for financial and accounting operations of eight ERISA qualified employee benefit trusts of more than \$30 Billion.

- Directed large outsourced teams to process daily financial transactions and securities pricing for over \$1Billion income and expense activity
- Developed and implemented monthly audits and reconciliations to streamline financial reporting for multiple accounts across employee benefit plans and trusts

Call Center Specialist

June 1990 – October 1996

Verizon Communications; Charleston, West Virginia

Managed call center operations to support a new multi-state post-sales support call center. Identified training initiatives to develop employees.

- Led in-charge desk to monitor key performance indicators, handle escalated calls, and direct traffic
- Provided reporting to support strategic planning initiatives and grow global operations

Education

▪ Masters Business Administration

University of Phoenix; Phoenix, Arizona; December 2012

▪ Bachelor of Business Administration-Finance

Georgia State University; Atlanta, Georgia; August 2003

Certifications & Training

▪ Lean Six Sigma Green Belt Certification

University of Georgia; November 2012

▪ Project Management, Business Leadership

University of Georgia; 2013

▪ Fiscal Administration Certification Training Series (FACTS)

University of Georgia; December 2015

Work Related Skills

- **Software Applications:** PeopleSoft, OneUSG Connect, Salesforce, Pardot, TouchNet, Qualtrics, UGA Foundation, ReconNET, Microsoft Office Word, Excel, PowerPoint, Visio, and Project.
- **Technical Skills:** GAAP, Data Analysis, Financial Management, Modeling, Operations, and Reporting, Budget Planning and Management, Project Management
- **Leading People and Change:** Conflict Resolution, Diversity, and Team Building, Process Improvement
- **Building Coalitions:** Outsourcing, Vendor and Relationship Management

Leadership Philosophy

As a transformational leader, I have served private and public organizations with a focus on organizational goals and objectives for over twenty years. Throughout my career, I have led diverse workgroups, employees, and cross-functional teams to build relationships, drive strategic change, achieve operational results, and develop human capital.

From my experience leading in a public organization, I know how to navigate a complex university system, collaborate with internal and external stakeholders, effectively communicate across all levels within an organization, and build meaningful relationships. Since joining the University of Georgia in 2010, I have been a results-oriented, thoughtful, strategic, and effective leader on numerous system and process improvement projects. I have established strategic organizational goals, developed methodical project plans and processes, and identified creative ways to allocate limited fiscal resources and human capital.

As a leader, I take an active role in personal growth and development by empowering individuals to contribute ideas, share their beliefs, and listen with a respectful and open mind. I foster a collaborative working environment by leading by example, encouraging others, and serving as a role model. I have extensive experience in motivating individuals by supporting their needs and goals while also discovering and leveraging their strengths. I inspire others to take risks, reflect on their experiences, and explore innovative ways to solve problems.

I am committed to leading the organization and individuals with integrity, trust, and respect by providing a diverse, inclusive, humble, and transparent environment. By working with an open-door policy I encourage others to contribute ideas and share honest feedback that sustains a highly engaged work environment.

Serving as a leader is a rewarding experience that provides opportunities to mentor others, champion change, build rapport and trust across the organization. Through effective coaching and communication techniques, I pledge to lead and motivate a results-driven and goal-oriented organization by focusing on four strategic goals:

Drive Strategic Change <ul style="list-style-type: none">• Inspire innovative solutions• Influence decision-making• Drive process improvement• Cultivate shared vision	Achieve Operational Results <ul style="list-style-type: none">• Manage financial goals• Create stakeholder value• Improve customer experiences and satisfaction
Build Relationships <ul style="list-style-type: none">• Foster business relationships• Partner with leaders and community stakeholders• Provide sustainable products and services	Develop Human Capital <ul style="list-style-type: none">• Attract and retain talent• Lead employee engagement and their contribution• Drive employee accountability

Diversity, Equality, Inclusion, and Belonging

As a strong proponent and advocate for inclusion, diversity, equality, and belonging, I am committed to leading and serving a diverse organization that provides equal opportunities, regardless of ethnicity, nationality, race, gender, sexual orientation, age, or religious beliefs. The culture of an organization is strengthened by encouraging individuals to share their beliefs, respect one another, and feel valued for who they are. The feeling of belonging encourages others to contribute to the goals of the organization and provides an accepting and safe workplace. I pledge to create a harmonious work environment and culture where all individuals are appreciated, provided equal opportunities, valued, and empowered to be successful, share, and thrive.