

Andy R Ross

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Profile

Accomplished Business Operations Leader with extensive record of success using expertise in the following areas: Financial Operations, Business Operations, Human Resources, Business Analysis, Business Reporting, Budgeting & Forecasting, Customer Service, Project Management, Process Re-engineering.

Experience

Senior Intacct Consultant

BT Partners, Chicago, Illinois

2018 – Present

Using my experience with Sage Intacct, I joined BT Partners to help clients implement and leverage the Sage Intacct accounting solution. After several months, I determined that this role was not the best use of my skills and have transitioned into a part-time project manager role for BT Partners.

Senior Vice President of Finance, North America

accesso (formally Siriusware, Inc.), Taos, New Mexico

2011 – 2017

Hired as Controller to replace the retiring CFO, promoted to CFO after 5 months. Responsible for all financial operations including accounts receivable and payable, budgeting, forecasting, preparing financial statements, managing ESOP valuation, and managing banking relationships. Revised several processes to reduce errors and increase efficiencies. These include month end close, time and expense reporting, and software support revenue recognition. Implemented Avalara AvaTax solution for managing sales tax.

Siriusware was acquired by accesso Technology Group in December 2013. Led financial aspect of due diligence and transaction. CFO title dropped after completion of acquisition. Promoted to Senior Vice President of Finance North America in May 2014. Managing day-to-day financial and Human Resource operations for accesso's North American business units. Successfully consolidated and standardized accesso's companies' financial processes and policies. Moved all companies to Intacct for accounting software, Nexonia for expense management, and ADP for payroll processing. Combined three 401k plans into one for all of accesso.

Using this framework, I ran the annual budget process for the four business units of the company. This included determining requirements, building models, importing data into Intacct, presentation to the C-Level, and maintaining the forecast on a monthly basis.

Business Unit Controller

Trimble Navigation Ltd. (formally QuickPen International), Englewood, Colorado

2002 – 2011

I was brought in to restart QuickPen's telemarketing effort. After implementing data management, scripting, and process, telemarketing-sourced sales generated over \$2.5 million in the first full year.

I soon took over Sales Operations. In reviewing the errors and delays in order processing, I implemented several changes including replacing the Excel-based proposal generation with a SalesLogix based system, and building closer integration between SalesLogix and internal systems. These steps reduced processing time by 2 hours per order and errors from 21% to 3% in six months.

After my successes in Sales Operations, I was promoted to Director of Administrative Services. This increased my responsibilities to include all Financial functions, Human Resources, Sales and Financial reporting, vendor management, and order fulfillment. Through this and effective cash and expense management, Net Operating Income for the company increased for four straight years.

During this time, we transitioned our sales management software from SalesLogix to Salesforce.com. After completing administrator training, I continued as the administrator for Salesforce.com.

QuickPen was purchased by Trimble Navigation Limited in March of 2009. My role transitioned to Controller for the QuickPen business unit. During this time, I successfully led the project to fold QuickPen's legal entity into Trimble's. I also led the project to transition from Solomon accounting to Oracle Financials and incorporate our home-grown ERP system into Oracle Financials.

Senior Management Consultant

C-Change, Inc., San Rafael, California

1997 – 2001

C-Change was a boutique consulting firm primarily serving the insurance industry. I was recruited to join the company by one of the three partners. Examples of projects I worked on are:

For a large property and casualty insurance company, I performed as-is assessments of existing contact centers and documented consolidation and operational improvements. I developed and implemented common customer interaction flows for voice, email, web-based chat, paper and facsimile interactions.

For an established full-service telecommunications company, I directed the design and implementation of a world-class customer service call-center. I directed the preparation of a business systems plan detailing existing systems, needs, and organizational requirements. I directed the development and implementation of an appropriate customer service organization and structure. I was responsible for the selection and installation of new technologies for customer service. At completion of the project, the company increased its agent productivity by 20% and decreased their call volume by 10% while consistently meeting publicly mandated service goals.

I assisted in development and implementation of a life insurance compliance program for the Life Insurance division of the one of the nation's largest life insurance companies. Project work included process mapping and redesign, technology selection, implementation design, development and rollout.

Customer Group Manager

Evolving Systems, Inc., Denver, Colorado

1996 – 1997

I led a staff of 40 software developers, architects and analysts to develop and deliver custom software for a large Bell Operating Company. The software was delivered on-time and on-budget.

Consultant to Customer Satisfaction Division

Tele-Communications, Inc., Denver, Colorado

1995 – 1996

Contracted by the Vice President of the Customer Satisfaction Division, I assisted with a project to improve the existing customer service organization. The initial two-month project was extended to twelve months. I developed the business justification for a \$35 million budget for the Customer Satisfaction Division that included four new regional call centers. I designed and implemented procedures for resource planning using call and process forecasting. I developed software and processes for call center reporting that reduced report generation time by two-thirds.

Director of Information Systems

MCI Communications, Inc., Denver, Colorado

1983 – 1995

I started as a part-time telemarketing representative in Salt Lake City, Utah, and worked my way up to Director of Information Systems in Denver. In that role, I brought object-oriented technologies into MCI's development organization through project sponsorship, internal consulting and education.

Prior to that role, as Regional Director of Sales Operations, I managed four telemarketing centers and was responsible for the reporting for all MCI's Consumer sales and service centers. I managed \$100 million budget for facilities, personnel, software and hardware. I implemented a technology overhaul of telemarketing reporting systems that resulted in an annual savings over \$500,000 and reduced reporting delays by 50%. I chaired a team of fifteen directors that made the tactical decisions for the division.

Education Bachelor of Science, Accounting

Western Governors University, Salt Lake City, Utah

Currently enrolled. Expected completion date the end of 2020.

Certifications Sage Intacct Implementation Specialist

Valid thru March 29, 2020

Skills

Strong Microsoft Office skills, Excel Wiz, Sage Intacct, SharePoint, Slack, Trello, Avalara AvaTax, Crystal Reports, Salesforce.com, Windows and Mac OS.