

M&A International Corporate Development Deal Front-End Activities and Lifecycle

- ADP Latinoamérica Region General Manager + Director, Latin America Market Development
 - International M&A Corporate Development front-end Deal activities: DMS competitive intelligence, market and target research throughout Latin America
 - Identified and executed equity opportunities
 - ADP Mexico: negotiated and purchased InfoProcess; ran its Operations; divested it to Autum
 - ADP Venezuela: establish ADP de Venezuela; divested it to Autum
 - Brazil: took 2 targets through Due Diligence + Integration planning, but ADP exited Latin America
- ADP DS Dir, M&A International Corporate Development Integration
 - Our template used the following stages, in which I participated as follows

Stage	Activity	Participation
<i>Pipeline</i>	Market Research + Opportunity Identification	None, except for the above Latin America work
<i>Early Pre-close</i>	Portfolio Funnel Management	I tried to implement some tools, but the BU M&A team leaders preferred to use intuition and non-automated tools
	Opportunity Vetting, Preliminary Business Case	
	Concept Approval, Early Target Discussions	
<i>Pre-close</i>	Final Business Case	Validated Integration assumptions
	Letter of Intent, Preliminary Negotiation	
	Data Room	Stood-up SharePoint Extranet so external team members could easily participate; administered the request lists and response process
	Due Diligence	Organized the teams and logistics, supported questionnaire development for many functional teams, participated onsite in as many discussions (some were in parallel) as possible, coordinated follow-up responses
	Due Diligence Reports	Validated Due Diligence Reports to verify reasonableness of proposed Integration plans
<i>Close</i>	Contract Negotiation	Reviewed contract drafts from an Integration perspective, negotiated and wrote many Transition Services Agreements, ran project plans to insure all required documents were developed, negotiated and signed
	Pre-Close Internal Integration Kickoff and Planning	Organized the Integration teams, transitioned Due Diligence reports into the first draft of the Integration Playbook
	Day1 Planning	Worked with HR and Operations to review and update the Day1 Target presentation content from the Integration perspective
	Day1 Announcements	Attended many on-site to be able to immediately begin working with the Target Integration teams
<i>Post-close</i>	Integration Kickoff with Target Participation	Planned and coordinated Integration Workshops as soon as reasonably possible after Close
	Integration Planning	Developed and maintained Integration Playbooks and Plans
	Integration Execution	Monitored Integration using IMO tools and processes
	Integration Communication	Developed newsletters for larger Integration, and in all Integrations kept the various constituencies informed of progress and non-confidential plans
	Integration Follow-up	Developed and delivered post-transaction assessments and Operations monitoring
	Continuous Improvement	Processed lessons learned, benchmarked business development processes and tools, and constantly implemented best practices

M&A International Corporate Development Integration and Divestiture Planning + Execution

- ADP Dealer Services (DS) Dir, Enterprise Divestiture Portfolio
 - Worked with outside advisors and an ADP Corporate Business Development counterpart to quickly organize the \$2B 9,000 person divestiture of the DS Division into a new publicly traded CDK Global, LLC from the \$10B ADP public company
 - Created 7 C-level driven programs with 57 teams – developed the weekly executive governance structure, and implemented effective home-grown reporting tools using MS Project, SharePoint, MS Access and Excel - unfortunately we could not get funding for a professional M&A execution suite
 - The divestiture was successfully completed in 8 months, concluding with an on-time SEC approval
- ADP DS Dir, M&A International Corporate Development Integration
 - Portfolio Managed – from Due Diligence through Integration through multi-year Post-Integration Reviews – \$1B cumulative Deal value for 22 deals across 25 countries; \$560M pre-Deal cumulative target annual revenue; 3,050 target staff onboarded, 140 divested; 20-60 person integration project teams per deal
 - Selected results (complete list included in M&A Deal Sheet)
 - Integrated a large multi-national UK based private company with a group of multi-country Dealer tech enablement companies into a 41 country 2,000 person international B-B IT Services division
 - Rolled-up and integrated international distributors across Europe, Asia and the Middle East
 - Huge US integration of a 1,000 person digital marketing (websites and advertising) company
 - Integrated an innovative multi-channel business tech services company into a new Nordic region
 - Two divestitures: one to Private Equity (UK), one to a JV (US)
 - Data mining group; Canadian adjacent market acquisition; US JV launch with two acquisitions
 - The above represent a variety of Asset, Equity & Carve-Out acquisitions and divestitures

IMO (Integration Management Office) Tools Development and Implementation

- ADP Dealer Services (DS) Dir, Enterprise Divestiture Portfolio
 - Collaborated closely with each set of program drivers and program managers, including outside legal and transaction advisory firms, to keep the project on track: IT projects used agile sprints, business process creation (for a new public company) and separation (for divesting formerly shared services) programs used MS Project, and infrastructure projects used Confluence (IT) and Projecto (facilities)
- ADP DS Dir, M&A International Corporate Development Integration
 - Built an International Corporate Development Integration Management Office (IMO): researched, designed, developed and configured a professional Deal Project Management process and advanced tools to enhance project consistency and deal integration quality – based on MS Enterprise Project Server, SharePoint, MS Access and Excel BI
 - The tools implemented included: hybrid-agile methodology, target / consultant data rooms, scope management tools, data-marts, issues / risks tracking, and an ROI Review process
 - Documented the front-to-back IMO processes and tools and trained and mentored each of the multiple deal participant teams; successfully defended a corporate internal audit of these best practices
 - Benchmarked these to best practices (ATK, EY, PWC, BCG) prior to a huge acquisition, and it was determined that my governance, processes and tools were more than adequate, and indeed were successfully used in 22 acquisitions and divestitures
 - Researched and recommended best practices M&A Life Cycle tools (IBM M&A Accelerator, eKnow Integrator) and Integration BI dashboard automation for use across all ADP CorpDev teams, but these were not implemented due to the CDK Spin

PMO Leadership

- PMP Certified
- CDK Global Sr Dir, Enterprise Business Transformation Portfolio
 - Broke down the outside consultants' initial drafts of potential business transformation initiatives which would yield significant profitability (\$100s of millions of costs / benefits) and revenue into 12 C-level driven three-year programs of 230 projects
 - Worked with each program's business driver and program manager as we organized their teams and developed high to medium level goals as agile epics to be iteratively decomposed at the appropriate time into backlogged stories
- CDK Global Sr Dir, Project Management Center of Excellence (PM CoE)
 - Took control of 150 projects (75 IT internal application development, 75 process improvement) in what until then was essentially an internal PMO-less enterprise (from a Portfolio - Program - Project Governance perspective)
 - Introduced, evangelized and required: charters, agile and hybrid-agile plans, MS Project with resource allocation, activity tracking, status reports, financial business cases and regular progress monitoring
 - Worked with three outside consulting firms regarding PMO governance (ATK, EY, PWC), however, the best practices and tools I had put together met or exceeded each of their recommendations
 - Brought together many of the PMs scattered throughout the organization into a PM Community, including a shared website and quarterly PM best-practices seminars
- Apriso Global PMO Program Manager
 - Managed 6 Project Managers and a portfolio of 140 projects; \$7M annual Supply Chain Execution Professional Services revenue; US Military, major Manufacturers, Logistics companies

PMO Tools Development and Implementation

- CDK Global Sr Dir, Enterprise Business Transformation Portfolio
 - Moved the transformation's portfolio management tools to the more robust MS Project Server Online (with PowerBI) platform with links to Atlassian's Jira and MS TFS (Team Foundation Server)
 - IT business application projects were managed via formal agile sprints with large on and off-shore teams, while cross-functional non-IT projects were managed via backlog prioritization and grooming leveraging in-house and advisor / partner SMEs
 - Collaborated closely with Finance team members and each Program's Finance Analyst to implement monthly project financials, ultimately leveraging Tableau as a simple effective executive dashboard to dynamically blend forecasts, actuals, baselines and result comparisons to any prior month's forecasts
- CDK Global Sr Dir, Project Management Center of Excellence (PM CoE)
 - Implemented modern cloud-based Portfolio Management tools – switched to MS Project Server Online and Power BI from Planview PMO Governance because: it was more powerful, a natural fit for experienced PMs, and more easily interfaced with Agile tools like Jira and TFS
 - Collaborated closely with the IT Internal Apps managers to pull all their 110 on and off-shore resources, plus non-IT SMEs, into a central MS Project Resource Management pool
 - Trained IT Internal Apps managers on PM basics: transformed disjointed back-of-napkin resource and project management into visible and monitorable dynamic portfolio and resource management leveraging TFS and Jira for Agile projects, home-grown Salesforce.com and Confluence program and issues management tools, and MS Project for cross-functional applications, especially those being co-developed with outside partners
- Apriso Global PMO Program Manager
 - Developed and implemented a sophisticated home-grown global Professional Services Administration tool-kit using MS Project Pro, Excel BI, MS Access and JournyX time tracking

Finance Expertise and P&L Operations Responsibilities

- Regarding the Finance aspect of this position, throughout my career: I have worked on large Finance software and business process improvement projects, prepared M&A deal business cases and non-M&A project financials for and with my Finance colleagues, developed P&L forecasts and reported actuals for my business units, and have developed Accounting (GL, AR, AP, FS; US + Latin), Payroll, and Management Reporting business system modules
- Regarding M&A Financials, in addition to preparing and presenting 100 day, 1 year and 2 year retrospective senior executive reviews, I implemented a monthly ROI Review process with multi-level Executive dashboards covering IRR, Valuations and Key Stats tracking to satisfy all stakeholders
- CDK Global Sr Dir, Project Management CoE (2 ½ years, Hoffman Estates, IL)
 - P&L responsible for this \$1M business unit
 - Took a small Finance PMO team and transformed it into an enterprise-wide Project Management Center of Excellence
- Apriso Canada Region General Manager (4 ½ years, Windsor, ON Canada)
 - Full P&L responsibility; 11 Dev & Prof. Services staff; CA \$1M revenue; President's Club (2001)
 - Responsible for client requirements and development coordination, and application implementation and relationships through launch and beyond
- ADP Latinoamérica Region General Manager (5 years, Mexico City)
 - Full P&L responsibility; 34 associates in MX, VZ, US; increased annual revenue from US \$150K to \$800K; managed all Manufacturer Relations for the region; President's Club (1997)
 - Responsible for market success through a focused product/service strategy

IT Savvy

- Bachelor of Science in Computer Science
- Business Application Lifecycle Owner
 - Extensive customer facing and internal business software design, launch & ownership experience, leveraging in-house and contract resources
 - Program managed each IT application development project as the Development Lead, from ideation through not only the Software Development Lifecycle, but also through successful pilots + general release
 - Activities included: evaluate all stakeholders' goals, understand business cases, drive root cause analysis, gather requirements, architect comprehensive solutions, incorporate infrastructure and partner interface requirements, validate design, project manage development and delivery, test, assure quality, train, pilot, launch, facilitate migrations, provide support, monitor results to verify impact
- VWoA V-Crest International Staff Analyst Dealer Management Systems (DMS)
 - Researched and developed customer facing, dealer-internal, and OEM/Partner applications
 - VW de México: tropicalized, platform migrated, and launched VW Mexico (TIC) HP/9000 DMS (Dealer Management System)
- VWoA DMS Development Chief Architect, Business Systems Analyst, Programmer
 - Developed key DMS modules and managed platform migrations: HP/3000 > IBM S/36 > IBM AS/400
 - Executed all the activities of the Business Application Lifecycle Owner (as listed above)