

Career Experience

University of Massachusetts, Amherst - Isenberg School of Management

Lecturer, Operations and Information Management (01/24 to Present)

Supported student centered education and contributed to course development for nationally ranked MSBA, MBA, and MF programs.

- Delivering courses for Isenberg graduate programs including Project Management, Mastering Agile Scrum, and Business Application Development with Python.
- Acted as a departmental industry liaison, fostering relationships with the University business community. Collaborating on industry networking events and facilitated data collection for graduating students.
- Partnered on developing a non-credit course focused on job market skills for graduate MSBA students.
- Provided mentorship and coaching to students, focusing on job market skill development and success in graduate school.
- Supported the design and developed courses that integrated strategy and analytics to support the MSBA program's curriculum goal.

Tenerity, Inc.- Stamford, CT

SENIOR DIRECTOR, FP&A – GLOBAL OPERATIONS & IT (04/22 to 11/23)

Supporting Financial Planning and Analysis globally, producing analytics for executive and board requests.

- Global Operations FP&A Leader, acting as primary Finance business partner for COO and CIO. Additionally supporting operational, functional segments, including PMO, Billing Ops, Info Protection, IT Shared Services, Facilities, App Dev, Service Delivery, and Sourcing.
- Providing leadership for FP&A analysts, onshore and offshore, assigned to operational vertical support.
- Acting as planning and analytics SME on OneStream implementation efforts and optimization efforts to re-align organizational hierarchy segments in Oracle Essbase reporting.
- Provide thought leadership on Finance Transformation, information delivery and analytics across FP&A. Leading discussions to enhance reporting capabilities and transition to more advanced analytic approaches via MS PowerBI. Lead buildout of expense analytics and KPI production via BI environment.
- Partnering on development of five-year strategic plan, annual budget, and monthly forecasts. Providing variance explanations and consolidation of roll-up reporting from various team members.
- Reviewing business-driven project proposals for inclusion with budgets for both OpEx and CapEx spend

XPO Logistics - Greenwich, CT

FINANCE BI AND TRANSFORMATION, SENIOR MANAGER (8/2018 to 04/2022)

Supported Finance Shared Services organization as a part of the Transformation and Strategy team, leading operational improvement efforts, systems enhancements, FP&A leadership, and reporting automation.

- *Business Intelligence Leader – Championed the planning and execution of Finance BI efforts, including team leadership in various verticals to ensure fast value delivery across operational and corporate finance on Finance BI platforms via PowerBI.com as a primary data visualization tool.*
 - *Lead the automation of 60%+ of financial reporting for Order to Cash (GBS) processes.*
 - *Lead the transition for monthly FP&A P&L, T&E, Vendor, and Payments analytics from Excel to BI tools via interactive BI environments providing more in-depth analytical ability.*
 - *Defined reporting and analytic needs with Finance Shared Services leadership*

- *Drove PowerBI adoption to 300+ unique finance users monthly with ~10,000 page visits by Q4 2020 with users from Portland, OR to Pune, India, and dozens of cities in between.*
- *Acted as a champion of Agile development methodologies by pushing for fast value delivery and iterating minimally viable products until departmental requirements are met*
- *Finance Transformation Leader- Lead project implementation from a functional FP&A perspective for Oracle ePBCS (Hyperion Planning). Acted as the lead for gaining funding from CFO's, vendor selection, contract requirements consultation, and initial rollout. Concurrently served as key functional stakeholder guidance on Oracle eDMCS deployment and Hyperion Financial Management (HFM) rollout.*
 - *Lead process design for enhanced efficiency in operational finance, specifically with AR collections, billing operations, and AP processes. Collaborated on strategy enhancements to drive down DSO, increase First Invoice Accuracy and reduce bad debt.*
 - *Lead development of robust customer satisfaction surveys, gaining feedback from ~295 users on BI platforms, tracking BI success vs. manual environments. Also built and analyzed results for a Coupa satisfaction survey and analyzed the Finance department results on behalf of the CFO for the company wide employee satisfaction survey.*
 - *Lead FSS benchmarking activities in partnership with the Hackett Group to understand the total cost of completing processes vs best in class benchmarks.*
- *FP&A Leader - Lead annual budgeting and monthly forecasting process for Financial Shared Services organization, globally.*
 - *Recommended strategies for achieving cost reductions while exceeding operational goals.*
 - *Lead offshore FP&A team, ensuring monthly deliverables are met on time and accurately.*
 - *Provided P&L analytics and ad-hoc executive support, aligning investments with outcomes.*

Cantor Fitzgerald - New York, NY

SVP, MANAGEMENT INFORMATION AND FP&A (10/2015 to 6/2018)

Lead Management Information reporting function while acting as IT and Back Office FP&A leader.

- *Budgeting and forecasting leadership* - Lead the strategic planning and monthly forecasting process for shared service operational functions and IT. Developed a global planning framework. Lead a team of senior analysts in NYC and London supporting the monthly forecast and annual budgeting process.
- *Analytics & Reporting Leader* -Partnered with operational leaders to provide Business Intelligence capabilities with Oracle Data Visualization desktop and Power BI, giving real time insight on volumes, productivity, and cost drivers. Built a charge-back model with tiered pricing based on risk profiles for new client requests by leveraging operational analytics. Headed the reorganization of data hierarchies to reflect key organizational performance metrics.
- *Program Management* - Lead implementation projects for Oracle Planning (Hyperion) and Fusion analytics as a SME driving vendor selection, initial requirements scoping and project kickoff.

GE Capital - Stamford, CT

FINANCIAL PLANNING & ANALYSIS MANAGER – TREASURY OPERATIONS (10/2014 to 10/2015)

Acted as Operational Expense Leader and budget owner for GE Capital's Treasury business unit.

- *Analytics & Reporting Leader*- Provided monthly P&L reporting for Treasury's total OpEx footprint, focused on Technology and Operations spend and total cost of ownership by product grouping.
- *Budget & Forecast*- Partnered with Treasury leadership in developing quarterly plans. Drove corporate budgeting strategy within the BU and collaborated on identifying cost optimizations. Pinpointed and communicated risks and opportunities and delivered business aligned strategic planning.
- *Project Management* – FP&A SME for Treasury dept implementation of Hyperion Planning

Citigroup - New York, NY

VICE PRESIDENT, FP&A – OPERATIONS AND TECHNOLOGY (10/2010 to 10/2014)

- *Budget & Forecast* - Spearheaded budgeting and forecasting process, as well as budget reduction and cost optimization initiatives for shared services and technology.
- *Controllershship*- Owned IT product costing for Data Center and non-Data Center products, rate card build-out, and global IT budgeting. Lead IT product benchmarking efforts to understand competitive space. Maintained SW amortization schedules and CapEx costing models.
- *Project Management*- Functional business partner and SME on the implementation of Acorn Advanced Analytics and, subsequently an ITFM tool for IT costing.

Additional Experience

SENIOR FINANCIAL ANALYST - eBay Enterprise (GSI Commerce), King of Prussia, PA (01/09 to 10/10)

FINANCIAL ANALYST III - Wells Fargo Auto Finance, Chester, PA (01/06 to 01/09)

Education

- ✓ Ph.D., Technology Management – University of Bridgeport, School of Engineering, Bridgeport, CT, 2023
Dissertation – “Evaluating Critical Failure Factors for Business Intelligence Systems Implementation From Technical, Organizational, and Process Perspectives”
- ✓ MS, Enterprise Analytics - Pace University, Seidenberg School of Computer Science, NYC, 2018
- ✓ MS, Finance - Pace University, Lubin School of Business, NYC, 2012
- ✓ MBA, West Chester University, West Chester, PA, 2008
- ✓ BA, University of Delaware, Newark, DE

Certifications and Credentials

- Project Management Professional (**PMP**) – Project Management Institute - 2020
- PMI-Agile Certified Practitioner (**PMI-ACP**) – Project Management Institute – 2020
- Scaled Agile Advanced Scrum Master (**SASM**) – Scaled Agile / SAFe – 2020
- Professional Scrum Master (**PSM I**) – Scrum.org - 2024
- Advanced Diploma in Global Business Services (**ADGBS**) – Hackett Institute - 2019

Technical Skills

- Oracle EPM (ePBCS, Hyperion Planning, HFM, eDMCS, Smartview, Fusion, OBIEE)
- BI Tools (MS PowerBI, Tableau, others)
- RPA (Automation Anywhere)
- Data Modeling (Alteryx, Power Query)
- Programming with Python, R, SQL
- MS Projects, Smartsheets, Monday.com

Recent Continuing Education and Professional Development

- ✓ Fundamentals of Case Teaching – Harvard Business Publishing Education – 6 hours – March 2024
- ✓ Essentials of Online Teaching – UMass IDEAS – 10 hours – April 2024
- ✓ Python Fundamentals – DataCamp – 15 hours – June 2024
- ✓ Machine Learning with Python Bootcamp – The Coding School – 40 hours – June 2024
- ✓ Machine Learning with Python Bootcamp II – The Coding School – 40 hours - July 2024

Publications

Journal Articles:

- ✓ Williams, Randy A., et al. "Understanding Business Intelligence Implementation Failure from Technology, Organization, and Process Perspectives." *IEEE Engineering Management Review*. 2023
- ✓ Williams, R., Sheikh, N., Duman, G., and Kongar, E., "Critical Success Factors of Business Intelligence Systems Implementation," *IEEE Eng. Manag. Rev.*, 2022, doi: 10.1109/EMR.2022.3197096.

Conference Papers:

- ✓ Williams, R., Sheikh, N., "Technical, Organizational, and Process Impacts of Business Intelligence Implementation Failure." 2022 Proceedings of PICMET '22: Technology Management and Leadership in Digital Transformation - Looking Ahead to Post-COVID Era · Aug 8, 2022

Dissertation:

- ✓ Williams, R., "Evaluating Critical Failure Factors for Business Intelligence Systems Implementation From Technical, Organizational, and Process Perspectives Using AHP.," University of Bridgeport, CT., 2023

Book Chapters:

- ✓ Williams, R., Duman, G., Kongar, E., "Achieving a Data-Driven Culture for the Post-Digital Era." In Erkollar, A., Oberer, B. "Digital Transformation: Essential insights for modern educators and industry leaders." ETCOP Institute for Interdisciplinary Research, 2024.
- ✓ Flamini, R., Williams, R., Duman, G., Kongar, E., "Accelerating Client Adoption in Digital Interactions.." In Erkollar, A., Oberer, B. "Digital Transformation: Essential insights for modern educators and industry leaders." ETCOP Institute for Interdisciplinary Research, 2024.

Prior Teaching Experience

University of New Haven

- Adjunct Faculty- MS Business Analytics- "Power BI and Dashboarding"

Quinnipiac University

- Adjunct Faculty -Business Analytics- "Introduction to Information Systems"

University of Bridgeport

- Adjunct Faculty -MS Business Analytics- "Enterprise Intelligence and Decision Support Systems"