

# Jessica Donaldson

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## FINANCE PROFESSIONAL/CONTROLLER

Forecasting | Budgeting | Management/Corporate Reporting | Payroll | Accounts Payable | P&L

### Executive Summary

- Balance Sheet Review
- Budget Analysis
- Business Analysis
- Business Development
- Cost Analysis
- Financial Data Analysis
- Financial Goals Development
- Financial Statement Interpretation & Analysis
- P&L Responsibilities
- Reporting
- Research & Analysis
- Sales Forecasting
- Sales Support
- Six Sigma Green Belt

**Energetic and innovative** Finance Professional/Controller with 20 years of diverse experience in financial-services industries and leading edge, fast-paced high-tech organizations.

**High achiever** in managing all aspects of budgeting, forecasting, strategic planning, expense management, operations, and administration.

**Team leader** who effectively meets goals through strong leadership, interpersonal communication, and analytical abilities.

**Skilled staff developer and coach** who motivates staff to reach full potential.

**Client-driven change agent** experienced in establishing and implementing department goals and objectives, managing change, designing successful sales/customer-service strategies, overseeing budgets, and leading sales force toward targeted goals.

## PROFESSIONAL EXPERIENCE

**Vice-President/Controller, Financial and Management Reporting, PricewaterhouseCoopers, Mandan, ND, 2006 to present**

*PricewaterhouseCoopers is one of the world's leading financial management and advisory companies, with offices in 150 countries and services in 22 industry-specialized practices. As an investment bank, it is a leading global underwriter of debt and equity securities and strategic advisor to corporations, governments, institutions and individuals worldwide. Through PricewaterhouseCoopers Investment Managers, the company is one of the world's largest managers of financial assets, providing services of 368 of the businesses identified in the Fortune 500.*

- Report to Senior Director, Regulatory and Legal Reporting, and oversee forecasting, budgeting, management/corporate reporting, payroll, accounts payable, and P&L across PWC's business platforms and serve as Group Controller for all support groups, managing a staff of six.
- Engineered \$US 50 million annual technology spend; obtained technology savings/expense reductions of \$US 4.5 million, including \$US 0.7 million in technology employee and consultant staff reductions.
- Led major initiatives, including IBM/ISM \$US 12.0 million trade-processing contract renewal with savings of \$US 2.2 million, AS400 lease contract renewal resulting in server consolidations and annual savings of \$US 2.5 million, and CGI (Star Quote) market data contract conversion to Reuters and Bloomberg with annual savings of \$US 1.0 million.
- Led vendor negotiations with Microsoft/Sony/Compaq/Acer for global desktop replacement program (entailing rollout of 3,000 desktops and networking systems nationwide); performed post-mortem review of project's expenditures; tightly controlled costs and optimized network/server systems to improve budget by \$US 1.0 million.
- Spearheaded project and developed business case with assistance from Technology Department to implement Contingency and Recovery (C&R) facility, a \$US 8.3 million 5-year contract.
- Led Finance Organization in restructuring PricewaterhouseCoopers regional territory upon sale of Global Private Client business, Securities Services Division, and PricewaterhouseCoopers Investment Management business to CIBC World Markets; restructured Finance Department to consolidate functions performed by 12 accounts-payable staff, and eliminated several other positions to reduce headcount from 36 to 13.

**Senior Manager, Service Quality, Comerica Online Financial Services Inc.,** Hebron, ND, 2000 to 2006

*The Comerica Financial family of companies provides online financial services in three categories: The Retail Bank, The Business Bank, and Wealth and Institutional Management.*

- Developed and installed units assigned to Sales, Training and Quality, Comerica University, Escalation, Billing, as well as Business Analysis and Reporting, for Call Center Operations, managing sales, customer service, and distribution of Stock Plan Administration Software marketed to Corporate Accounts.
- Exceeded sales goals to generate \$1M+ in sales first year; analyzed market conditions to identify and interpret trends and responded by initiating policy, pricing, and procedures changes.
- Designed, developed and delivered first training program to Corporate Services internal and new-hire associates, ensuring successful attainment of Equity Compensation industry certification program.
- Decreased inbound volume into help-desk support systems by more than 20 percent by expanding and refining Comerica University program to encompass client base as well as internal associates, delivering Certified Equity Edge Expert program that trained clients to utilize online tools.
- Managed and packaged SAS70 audit results for Equity Edge software clients and internal outsourcing unit within 4 months and \$3K under budget.
- Developed, installed, and managed quality-monitoring program for Corporate Services support staff including Help Desk and Outsourcing Stock Plan Administration units; developed and implemented performance goals and objectives.
- Initiated and managed installation of Six Sigma process program to Corporate Services Department, extending to entire Comerica Corporate Operations planned for 2006; developed and managed external Best Practices client training and support programs to generate \$1.6M+ in annual training revenue.

**Senior Manager, Strategic Planning and Reporting, IBM Computer Corporation,** Mandan, ND, 1996 to 2000

*A Fortune 500 company, IBM is one of the world's leading direct marketers and manufacturers of computer systems.*

- Reported to Vice President of Finance and managed preparation and dissemination of budgets, forecasts and financial reports for local executive management's use and for corporate office in Houston, TX; reported on annual sales revenues of \$900 million; managed staff of 15.
- Gave IBM competitive advantage by designing customer experience metrics to measure satisfaction, enabling IBM to become only company in the industry that could provide customer with service-satisfaction statistics.
- Maintained 90 percent accuracy level in 90-day unit demand forecast; identified market trends and used business acumen to generate precise forecasts for corporate office in Houston, TX.
- Reduced expenses by \$2 million yearly by relocating IT department to Houston and reducing headcount by 20; restructured department so that only three employees were required to maintain support for regional division; earned Outstanding Management Award for completing project ahead of schedule and transferring company's systems seamlessly.
- Led initiative to move sales organization to segmented reporting system; developed reports that allowed sales directors to see exactly where company's sales were coming from, alerted them to areas that required development, and reallocated resources accordingly; achieved 100 percent year-over-year growth for two complete years as a total company.
- Developed and delivered forecasting and budgeting tools and processes, which were previously non-existent; implemented Quarterly Operations Reviews for CEO for discussions with parent company to improve understanding of regional division's projected revenue growth and pitfalls.

**Director, Sales Operations, Merck Corporation, Mandan, ND, 1992 to 1996**

*Merck Corporation is one of the largest pharmaceutical distributors in North America. Merck is also known for their dedication to providing unbiased medical information, assisting not-for-profit organizations, and providing services and supplies to those who cannot afford them.*

- Directed national customer-care/sales call-center division of Medical Pharmaceutical Group; deployed effective leadership to direct department operations toward shareholder, customer and employee satisfaction.
- Reduced average speed of answer to under goal of 25 seconds in 4 months; decreased attrition of division from 17 percent to less than 4 percent within 8 months.
- Developed and successfully managed \$21 million annual budget, including revenue forecast, research, and reporting of financial projections to senior staff; analyzed procedures, systems, and materials management, human resource management, workload and scheduling requirements as well as operational requirements to ensure center performance goals were exceeded.
- Aligned and trained management staff to focus on attaining world class service levels through quality feedback to staff utilizing Witness Monitoring System, top-level training programs and targeted interviewing/hiring specifications.
- Built and implemented employee-owned development matrix for all management and call-center staff; selected, trained, and tested employee base to support continued educational and career objectives.
- Conducted two all-customer surveys; reported results to internal partners with issue, cause, and resolution outline to significantly impact internal and external customer satisfaction.
- Led company-wide strategic team developed to redefine and align services and responsibilities of customer care and distribution operations groups; planned, developed, and implemented action-oriented meetings with 31 nationwide distribution centers; developed issue, cause, and resolutions for identified opportunities and implemented plans to affect changes to both customer-care and distribution operations.

**Director Planning and Administration, Kodak Corporation, Sacramento, CA, 1988 to 1992**

*Kodak, a global multimedia corporation, is an industry leader in professional and consumer imaging equipment and information systems.*

- Reporting to President, supervised all Kodak Retail division administration functions; led and supported branch and divisional functions; oversaw company budgeting process and effectively managed regular communication of budget performance to senior management and branch personnel; managed staff of 130 with budget responsibility of \$35 million.
- Saved company money and ensured compensation accuracy by developing and delivering new sales-compensation plan; ensured timely information delivery to executive team and sales force.
- Propelled company to met forecasted numbers and achieve 20 percent growth year over year in an industry where average growth was 10 percent by developing three-year strategic business plan to support growth and by partnering with other executives to identify opportunities and implement business strategies.
- Reduced machine inventory from \$8 million to \$2 million; created policies around use of trials and collaborated with Sales VP/Director to implement these policies.
- Improved productivity and saved company approximately \$10 million through playing key role in restructuring company; reengineered all financial processes and related systems; redesigned all related jobs, resulting in enriched staff development; reduced headcount from 1,500 to 1,000.

**EDUCATION**

Master of Business Administration, Jamestown College, Jamestown, ND, 1990

Bachelor of Arts in Business Administration, South Dakota State University, Brookings, SD, 1980

