

MITCHEL PATTERSON

CHIEF FINANCIAL OFFICER | CHIEF DATA OFFICER

Turning the promise of big data and automation into quantum leaps in performance

Advanced Analytics-Linked Valuation: 10X

Business Automation-Driven Profit: +23%

Finance Technology ROI: 800%

Expertise in both classic finance and new-wave technologies fueled by artificial intelligence and machine learning

Forward-looking business shapeshifter who turns traditional finance organizations into vital growth influencers via robust data and automation strategies. Creator of mature enterprises—freed from inefficiencies, focused on high-ROI activities, and able to adapt at lightning speed to rapidly shifting business needs. Strategic partner who builds the right service delivery models to support all core functions in capitalizing on business insights via predictive analytics.

Sure-Win Formula for Technology- and Data-Driven Disruption

Upgrade Talent to Digital Natives

Build Trust via Quick, Finance-Owned Wins

Upend Siloes via Data Centers of Excellence

Evangelize a Culture of Data & Automation

Cascade Impact Enterprise-Wide

LEADERSHIP VALUE

- Organizational Strategy
- Strategic Business Partnering
- Team Building & Development
- Business Transformation
- Business Automation Strategy
- Predictive Analytics & BI
- Agile Organizational Models
- Operational Efficiency
- Data Governance Models
- Cultural Transformation

- ⇒ CFO Quarterly Award Winner (2019)
- ⇒ Up to \$1B P&L Responsibility
- ⇒ Business Analytics MBA (Wharton)
- ⇒ M.S. in Finance (MIT Sloan)

PROFESSIONAL EXPERIENCE

ABC ENTERPRISES • Wholesale technology products distributor • \$650M in annual revenue • San Francisco, CA

Chief Financial Officer, 2018–present • **SVP, Finance** 2016–2018

P&L: \$650M • 10 direct/40 indirect reports

Charged with designing, communicating, and executing the enterprise-wide data and analytics strategy to dramatically improve performance. Oversee ad-hoc advisory services to business and functional areas supporting analytics adoption.

Turned team of mere stewards of reporting and compliance into true business partners and rallied them behind the most impactful growth-driving initiatives in a decade. Earned prestige and recognition for team with the *ABC Difference Maker Award (2019)*.

- ⇒ \$250M to \$650M Revenue Thrust
- ⇒ 10X Valuation Boost
- ⇒ 48% OPEX Reduction

FINANCE REVOLUTION

- **Power-Team Building:** Attracted top data-analytics talent with broad business insight and in-depth knowledge of tools, methods, and technologies to integrate data and draw conclusions on how to create value.
- **Business Automation:** Freed resources for value-added activities by automating core finance and accounting processes. Reduced forecast process hours from 100K to 5K per year and improved forecasting accuracy from 80% to 99.9%.

BROAD BUSINESS REVOLUTION

- **Enterprise-Wide Data Strategy:** Spearheaded a center of excellence with improved data quality to drive AI and data science initiatives. Streamlined all company data efforts under umbrella of data governance and strategic prioritization.
- **Business Partnering & Value Creation:** Launched self-service BI tools and supported leaders in capitalizing on predictive analytics capabilities and automation. Propelled a wave of value that hit every corner of the enterprise from lead generation, cross-selling, and dynamic pricing strategies to sourcing, inventory planning, and talent management.

"If there ever was a hearts and minds guy, it's Mitch. Yes, he is one of the brightest minds in Business Analytics, but it was his ability to turn skeptics into evangelists from the C-suite down that made the biggest difference."

– Richard Vaughan, CEO, ABC Enterprises

XYZ INC. • B2B print and digital document products and services • \$1B in annual revenue • San Francisco, CA

Chief Data Officer, 2014–2016 • **SVP, Finance** 2009–2014

P&L: \$1B • 7 direct / 100 indirect reports

Recruited to a classic finance mandate, leading all accounting, reporting, and controllership functions. Influenced broadening of the scope of the role to cross-functional data revolutionary with enterprise-wide impact. Responsible for a shared Data Center of Excellence, serving as the steward of data and an indispensable partner for the entire organization.

Turned devastating losses into rapid gains. Transformed a backward-looking organization with a descriptive data model into a forward-looking predictive-analytics model that fueled spot-on resource prioritization.

- ⇒ **28% Revenue Growth**
- ⇒ **23% Profit Gains**
- ⇒ **8-Fold ROI on ERP Investment**

FINANCE TRANSFORMATION

- **People Development & Team Building:** Filled critical talent gaps with data scientists capable of preparing the business to build, run, and operate big-data applications. Partnered with HR to train the remaining team of overtaxed finance generalists to become focused decision-support experts. Incentivized scalable solutions across support areas.
- **Finance-Process Automation:** Innovated the core finance operating model, drawing on robotic process automation for transaction processing, compliance, and reporting—dramatically reducing both costs and risks. Readied the structure for standardization and coordination among systems to scale the initiative beyond finance.

BROAD BUSINESS TRANSFORMATION

“Aside from Mitch’s obvious growth superpowers, he has an incredible ability to get people to embrace tech rather than fear it. This has been key to turning around our business.”

– John Allen, CEO, XYZ Inc.

- **Technology ROI:** Spurred completion of a lagging ERP implementation to improve ROI. Maximized value by advising business functions in customization and predictive analytics capabilities, reducing dependence on external vendors.
- **Seamless Analytics Delivery:** Established a dedicated Big-Data Center of Excellence guided by an enterprise-data-science steering committee. The hub became critical for identifying invaluable data, highlighting analytics applications with the most significant impact on the business, and accelerating adoption within the company.

123 CORP • Electronic components company • \$24B in annual revenue • Presence in 95 countries • San Francisco, CA

VP, Finance, 2002–2009

Budget: \$4M • 6 direct/10 indirect reports

Steered Accounting, Treasury, FP&A, and Finance Analytics. Challenged to drive the business forward by detecting inefficiencies within finance and beyond, earning recognition as a respected corporate strategist. Functioned as the face of the company to outsourced data-analytics vendors.

Reengineered inefficient, Excel-based finance processes into state-of-the-art, cloud-based solutions that enabled strategic leadership decision making by revealing operating drivers of performance.

- **Team Leadership & Engagement Strategies:** Stabilized an operation suffering debilitating talent flight, generating new enthusiasm for an analytics-driven strategy and providing opportunities for professional development.
- **Advanced Analytics & Business Intelligence:** Mapped out processes and produced machine learning- and AI-driven redesigns, launching a full suite of real-time predictive analytics tools that empowered leaders with decision support.

EARLY-CAREER FINANCE FOUNDATION

Finance Director, NextStep Technology (San Jose, CA), 1998–2002

Financial Planning Manager, Scion Group (Los Angeles, CA), 1996–1998

EDUCATION & ACADEMIC PRESTIGE

Master of Business Administration, Business Analytics • University of Pennsylvania, The Wharton School • 2018

Master of Science, Finance • Massachusetts Institute of Technology, Sloan School of Management • 2006

Bachelor of Science, Finance & Accounting • University of California Los Angeles (UCLA) • 1994

RESUME STRATEGY

Mitchel Patterson wanted to continue his impressive career ascent and secure a position as a Chief Financial Officer or Chief Data Officer. Our work to differentiate him focused on crystallizing his value as a progressive finance leader and expert in advanced analytics.

Mitchel believed that in the current business climate, the CFO role was at risk of losing its relevance. He wanted to position himself as *the* driving force behind business solutions that would transcend the function—namely business automation, analytics/business intelligence, and technology optimization. He believed that the most effective way to lead a data and technology revolution was not from within IT or other functional areas but from the financial organization due to its broad scope, credibility, and traditional role as a steward of information. He had led that very revolution twice in his career, and the impact was staggering.

Together we clarified his target: 1). Companies that needed to leverage big data and automation as their only path to business survival but lacking the expertise to make it happen 2). Companies that had invested heavily in technology and were struggling to capture ROI from their efforts. Both the tagline and the subheading line with information inside the blue arrows were critical for his positioning. Rather than using the usual expertise/keywords for the subheading line, I wanted to link each area of core expertise to quantifiable value to instantly generate interest in his profile.

One of my greatest challenges was to distill vast amounts of information into more manageable pieces. In lieu of an overly lengthy summary paragraph, I opted for a shorter paragraph, focused exclusively on the business pain that Mitchel can alleviate, such as inefficiencies, slow-to-react business models, and inability to derive useful insights from data.

I followed this with a (visually highlighted) strategic action plan, which serves two purposes: 1). It shows the exact steps he takes to enable companies to capitalize on business intelligence/automation, and 2) It communicates his key talents quickly and in a more digestible format: team building, gaining buy-in for change (via quick wins in finance), uniting cross-functional areas behind a vision, driving a cultural transformation, and scaling impact across the entire organization (beyond finance).

In the experience section, these abilities are reiterated through achievements that correspond precisely to these abilities. This gave the career story a consistent feel and provided me with a focus on strategically selecting achievements among his long lists of initiatives.

Mitch firmly believed that the cultural element was the key to his success. Merely creating a bullet about cultural transformation felt unsatisfactory as it would have gotten lost inside the list. So I asked Mitch to gather comments from his superiors on his ability to influence the culture. We came up with a couple of powerful quotes that speak volumes to his ability to win buy-in and featured them prominently.