State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

4.0 Subject Matter Categories (Tab 4)

Accenture has extensive experience partnering with government and private sector clients on advanced analytic initiatives. Table 1 below highlights our experience with public and private sector clients similar to the State of Minnesota.

Client	Key Facts	Tax Collection, Fraud Prevention and Detection	Strategic Sourcing	Organizational Design	Strategy	Technology
Commonwealth of Pennsylvania	- $140 million or 21% annual savings - Designed a commodity based organization w/ centralized spend management	✔	✔	✔	✔	✔
State of Florida	- Saved over $184 million - eProcurement Operations, Organization Redesign Implementation, Straegic Sourcing	✔	✔	✔	✔	✔
State of Texas	- Identified $252 - $539 million in potential annualized savings - Analysis of legislative statutes and administrative & internal policies	✔	✔	✔	✔	
State of North Carolina	- Identified up to $96 million in annualized potiential savings - Strategic Sourcing, Organizationla, Strategy, and Technology Assessment	✔	✔			✔
State of Ohio	- Identified Savings Opportunity of $120 million, saved $32 million in 1 negotiation	✔	✔			
New York City	- $91 million in annual savings, 25 - 35% range - Developed 2 different groups w/in organization: Strategic and Transactional	✔	✔	✔		
Yale University	- Savings ranged from 8 to 11% on pilot categories - Developed strategic 3 year plan		✔	✔	✔	
State of Massachusetts	- Identified $33M in potiential savings through strategic sourcing - Straegy Development: Plan to reform $3.6B/year Provider Program	✔			✔	
Comerica	- $39.4 million in savings - eProcurement Implementation (Ariba, Emptoris, Aravo)		✔			✔
Independence Blue Cross	- 8% - 12% savings - Developed new Procurement To-Be Operating Model, 5% year over year savings		✔	✔		✔
Department Of State	- Implemented Ariba (Buyer, Spend Visibility, Contract Management) - Realized savings over $2 million/year in procurement, inventory, property management, distribution and IT expenses					✔
US Dept of Agriculture (USDA)	- Performed Benefits Measurements - Baselined organizational cost structure for multiple USDA agencies			✔		
US Dept of Health and Human Services	- $42 million or 16% savings - Communication campaign to various divisions to sustain savings		✔			
School District of Philadelphia	- $16 million or 10% annualized savings - Knowledge Transfer to develop workforce		✔	✔		
University of Texas (at Austin)	- $1.3 billion operating budget - $15 million in identified savings		✔			
University of Illinois	- $3 billion operating budget - Identified $28 million in savings		✔			
State of California	- Implemented Ariba Buyer with pilot - Communications, End User-Buy in & Training	✔				✔
New York City Metropolitan Transit Authority	- $15 billion operating budget - $37 million savings in 8 weeks		✔			
US Navy	- $12.3 billion in spend - Identified $450 million target for strategic sourcing		✔			
Large Global Specialty Retailer	- Manage between $1 and $2 billon of spend, buy products/services in 47 different categories & manage between 400 and 500 supplier contracts - Full source-to-pay outsourcing (Retek & Oracle)		✔			✔
Large Chemical Company	- Developed and rolled out global procurement strategy - Implemented Ariba ORMS, $400 million in savings have been captured since 2007			✔	✔	✔

Table 1: Examples of Accenture public and private sector analytics projects similar to MN

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10

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

We have provided multiple examples across various areas of advanced analytic capabilities that serve to demonstrate Accenture's achievements in partnering with clients that have challenges similar to those of Minnesota.

In the following subsections, we describe in greater detail, our approaches to support Minnesota agencies and government units in the following subject matter areas as identified in the RFP:

- Tax Collection, Fraud Prevention and Detection
- Strategic Sourcing

Accenture brings strong leadership with comprehensive analytic and functional expertise in these areas for Minnesota. Figure 2 shows the overall leadership structure for the Minnesota EDAP program.
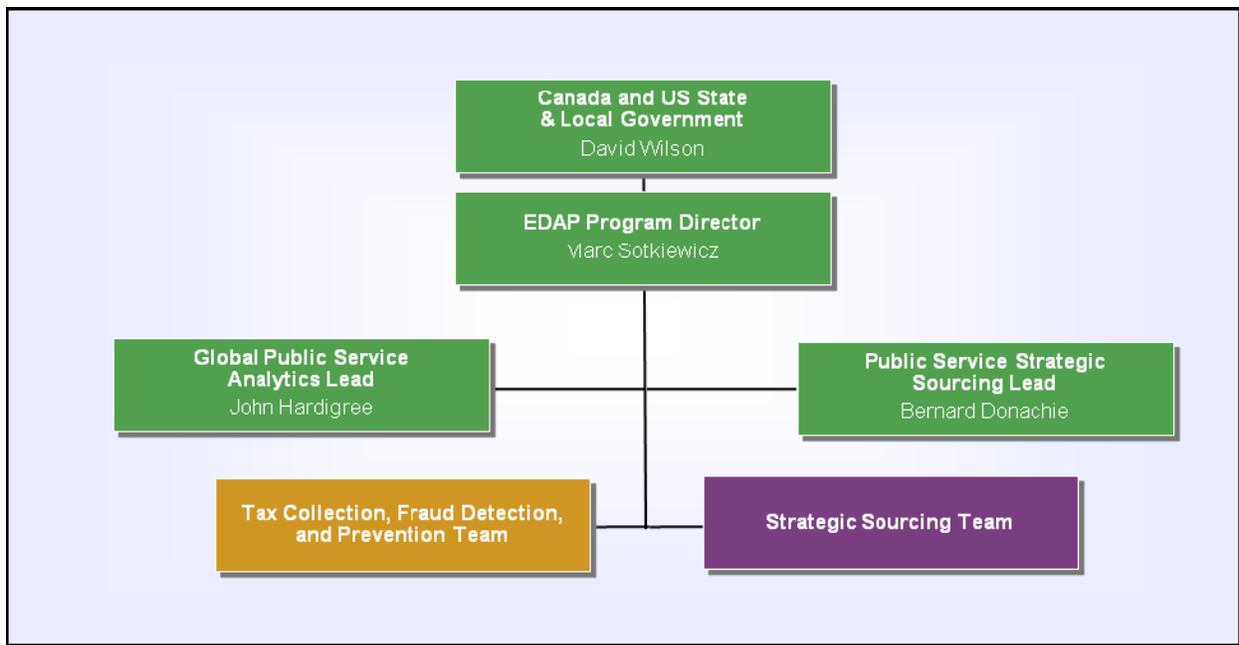

Figure 2: Accenture's EDAP leadership team brings comprehensive analytic and functional expertise to drive integration and right-sized solution development for the State

Our leadership team is structured to deliver expertise and thought leadership to drive innovative analytic solutions for the State. Table 2 provides a brief introduction of our EDAP Leadership Team.

Lead	Accenture Role	Summary
David Wilson	Managing Director, Canada and U.S. State and Local Government Client Service Group	David Wilson is the managing director for Accenture's Canada and U.S. State & Local Government practice, leading a team of management and technology professionals dedicated to helping the public sector achieve high performance. David is based in Accenture's Minneapolis office.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Lead	Accenture Role	Summary
		Accenture's Canada and U.S. State & Local Government practice implements innovative Human Services, Revenue and Finance & Administration offerings for the full spectrum of public sector organizations, including agencies, municipalities, crown corporations and universities. David and his team are focused on introducing new capabilities for cross-jurisdiction collaboration designed to help fiscally constrained public sector entities restructure and reform their operations to do better with less.
Marc Sotkiewicz	EDAP Program Director	For more than 20 years Marc has helped clients build new business results through improved business and workforce capability. His clients have incorporated technology, organization, culture, work and business process outsourcing as well as talent solutions. Marc leads Human Capital Analytics at Accenture; Accenture's global offering to drive maximum performance and business impact by the use of data and workforce analytic methods. He holds multiple patent applications for new workforce analytic techniques.
John Hardigree	Global Public Service Analytics Lead	John is a senior executive in Accenture's Advanced Analytics practice, as well as the Fraud and Compliance Management Practice. He is responsible for all proposed and delivery projects focused on advanced analytics and Information Management for Public Service organizations globally. Over the last 22 years, John has worked with many of Accenture's Fortune 100 clients and nearly all of our North America public service clients. John's work for these clients is led by a single tenet; "assurance that Accenture's solutions for our clients are value-led and powered by the full experience of our global cross industry, functional and technology teams".
Bernard Donachie	Public Service Strategic Sourcing Lead	Bernie is a Senior Executive in our Supply Chain Management Service Line and has 25 years of experience including 13 with Accenture. He leads Accenture's Public Services Sourcing Practice. Bernie has worked with clients in the Commonwealth of Pennsylvania, New York City Department of Education, University of Texas, United States Department of Health and Human Services and State of Ohio. He was a key member and project advisor on all the aforementioned clients. Bernie has over 28 years of strong leadership and advisory skills. Prior to joining Accenture, Bernie was the Procurement Director for IBM Global Services.

Table 2: EDAP Leadership Team Overview

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

4.2   Strategic Sourcing

4.2.1   Relevant Experience

Accenture has extensive experience working with leading companies and governments worldwide to conduct comprehensive strategic sourcing assessments and implementations; helping our clients to both identify opportunities and execute them. Over the past 12 years we have managed more than $1.1 trillion in addressable spend and helped clients negotiate nearly $35 billion in savings across more than 250 commodity groups to achieve annualized savings of more than $4.7 billion.

Accenture Procurement Experience with State Governments
▪ State of California ($209B / #1)
▪ State of Texas ($90B / #3)
▪ State of Florida ($66B / #4)
▪ Commonwealth of Pennsylvania ($63B / #5)
▪ State of Ohio ($58B / #6)
▪ State of Massachusetts ($46B / #11)
▪ State of North Carolina ($40B / #12)
▪ State of Kansas ($13B / #36)
Source: NASPO FY2009 State Expenditure Report (Budget / Rank)

Extensive experience with states comparable to Minnesota gives us a unique advantage in understanding how to most effectively assess and implement strategic sourcing programs. We have strategic sourcing experience with the #1, #3, #4, #5, #6, #11, #12, and #36 largest states in the U.S. based on fiscal year 2009 budgets. This experience has translated into a strong track record of delivering savings, for example: PA DGS ($140 million), Florida ($54 million), NYC DOE ($86 million) and OH DAS ($32 million).

Our broad and deep experience also allows us to help our clients develop procurement capabilities closely related to strategic sourcing such as organizational design, strategy, and technology. We customize our approach for each client or project based on our experience and the specific needs of a client in order to maximize the benefits achievable.

4.2.2   Overview of Strategic Sourcing Related Services

The RFP specifies the need for services in two focal areas of Strategic Sourcing: (1) Vendor account audits and (2) Identification of cost "avoidance" or savings opportunities. Accenture views these two areas as part of a broader framework of potential activities that organizations utilize to improve the efficiency and effectiveness of their procurement processes. This broader Procurement Transformation Framework is shown below in Figure 5. Many projects use multiple parts of the Procurement Transformation Framework; however, per the RFP this proposal focuses only on the Strategic Sourcing Assessment (which identifies cost savings opportunities) and vendor account audits portion of Quick Hits.
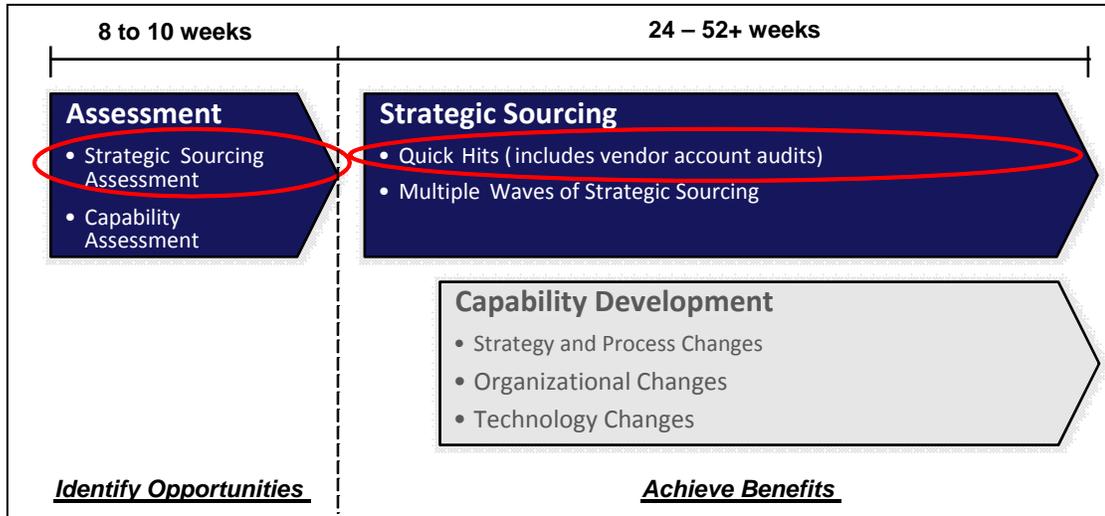
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25

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Figure 5: Accenture's Procurement Transformation Framework

As an overarching principle, our approach is highly collaborative. This is crucial to the quality of the results, building stakeholder buy-in across the organization.

4.2.3   *Strategic Sourcing Assessment*

The objective of the Strategic Sourcing Assessment is to identify, quantify, and prioritize cost savings opportunities, thereby allowing the State or an Agency to understand what cost savings opportunities exist, the size of those opportunities, and the order in which they should be pursued.

Accenture, working with Minnesota procurement professionals would conduct the assessment over a period of eight to ten weeks, depending on the specific scope of the work. The assessment would be to address the following questions:

1) How much is being spent?
2) Where is money being spent?
3) Who is spending money?
4) What is being purchased?
5) What is the category segmentation and potential savings?
6) What are the potential quick hit opportunities (including vendors which are good candidates for audits)?
7) What sourcing tool(s) might best help to achieve the potential savings (i.e., auction, Request for Proposal (RFP), other)?

To answer these questions, the assessment team follows the process shown in Figure 6. We recognize that this process, which we have applied successfully at many clients, may need to be modified because of the specific needs of a project. During this process the assessment team would gather relevant quantitative and qualitative data, analyze and classify the data, and then identify and prioritize strategic sourcing opportunities.
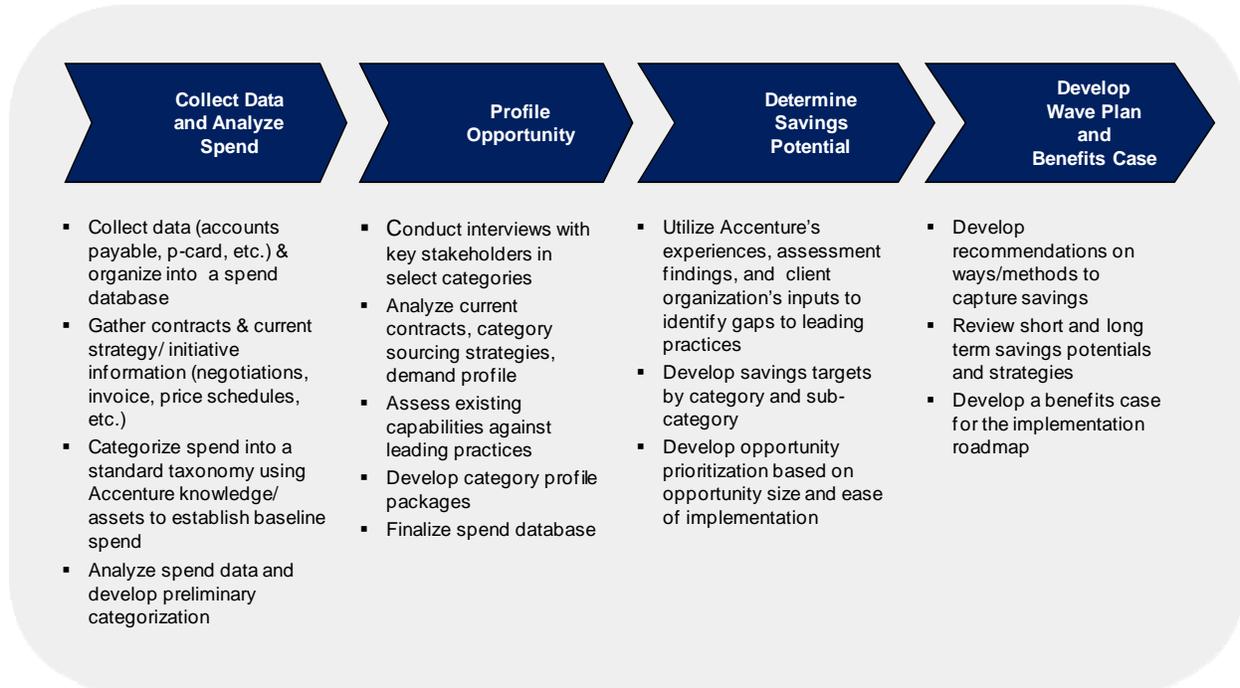
26

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Collect Data and Analyze Spend	Profile Opportunity	Determine Savings Potential	Develop Wave Plan and Benefits Case
▪ Collect data (accounts payable, p-card, etc.) & organize into a spend database ▪ Gather contracts & current strategy/ initiative information (negotiations, invoice, price schedules, etc.) ▪ Categorize spend into a standard taxonomy using Accenture knowledge/ assets to establish baseline spend ▪ Analyze spend data and develop preliminary categorization	▪ Conduct interviews with key stakeholders in select categories ▪ Analyze current contracts, category sourcing strategies, demand profile ▪ Assess existing capabilities against leading practices ▪ Develop category profile packages ▪ Finalize spend database	▪ Utilize Accenture's experiences, assessment findings, and client organization's inputs to identify gaps to leading practices ▪ Develop savings targets by category and sub-category ▪ Develop opportunity prioritization based on opportunity size and ease of implementation	▪ Develop recommendations on ways/methods to capture savings ▪ Review short and long term savings potentials and strategies ▪ Develop a benefits case for the implementation roadmap

Figure 6: *Accenture's Analytical Strategic Sourcing Assessment Process*

The assessment team uses a variety of tools depending on project needs to conduct strategic sourcing assessments and would bring the right set of tools to accomplish a project in an effective and price conscious manner. Because every project is unique, the tools required to effectively complete it vary. Examples of factors that impact a strategic sourcing assessment project are:

- Preference of client
- Number of line items
- Number of fields
- Number and type of source systems
- Quality of data
- Speed to complete assessment

For conducting basic strategic sourcing assessments, we use Microsoft Office tools such as Access and Excel. We have combined these tools with our extensive experience conducting this type of work and developed assets in these applications that assist the project team in quickly organizing, cleansing, and classifying data. This approach often meets our clients' needs and eliminates additional software costs.

For strategic sourcing projects that require a more sophisticated tool, we use software solutions from our alliance partner Emptoris. Emptoris offers a suite of applications which support one time spend analysis as well as ongoing procurement project management and data analysis. For conducting a strategic sourcing assessment, Emptoris Spend Analysis is the most commonly used application. It offers the following advantages:

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

- **Top-Rated Tool** – The Industry's top-rated Spend Analytics solution per Forrester which gave the product a perfect score for all capabilities measured.

- **Accuracy and Granularity** - Emptoris Spend Analytics is recognized for providing high levels of spend data accuracy and granularity, achieved via the proprietary technology described below. This point is validated both by our customer results and the Forrester Research study noted above. This leads to confident decision making.

- **Advanced Analysis** - Emptoris Spend Analysis offers a diverse set of capabilities to enable the State to utilize the full potential of its spend. It provides both standard reports as well as interactive capabilities for getting to the data that procurement organizations truly need.

In addition to basic reporting, analysis and filters, our clients use Emptoris Spend Analytics for:

- **Reports Beyond Spend** - Emptoris Spend Analytics offers reports that provide insight not only into improving spend and unique insights with categories and grouping of spend but also into procurement efficiency and fraud.

- **Scalability** - Emptoris Spend Analytic is offered as a stand-alone but can be used in conjunction with the integrated Emptoris Suite, which includes eSourcing, Contract Management, Supplier Performance Management and Compliance.

After completing the assessment, the assessment team provides a comprehensive "Assessment Report" for review and approval by the organization leadership with sample summary reports (independent of the tools used for performing the assessment) such as:

- **Spend Summary** – The Spend Summary output summarizes views of the data collected and analyzed as part of the spend assessment process providing important high level information and context for the remainder of the report.

Figure 7: Spend Summary Examples

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

- **Spend Profiles** – A spend profile output is developed for all, or a targeted portion, of the categories from which cost avoidance could be achieved utilizing strategic sourcing. It also provides the starting point for the implementation of strategic sourcing for that category.

Figure 8: Spend Profile Examples

- **Commodity Prioritization and Wave Summary** - The Commodity Prioritization output prioritizes cost avoidance opportunities by understanding the potential savings and ease of implementation for each category, the categories which are easiest to implement and have the highest savings are prioritized the first. Then by grouping these prioritized categories into waves, a definitive plan for sourcing can be developed. The finalized plan and associated information is shown in the Wave Summary output.
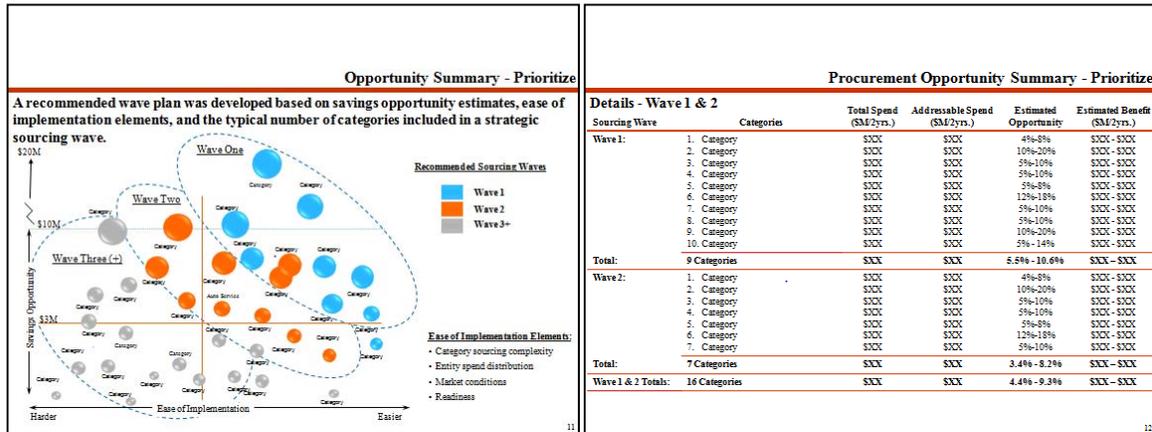
Figure 9: Category Prioritization and Wave Summary Example

Beyond the sample outputs shown above, Accenture has the ability to develop additional outputs or work products if required by a particular project. These requests for specific outputs are common amongst our clients and we are committed to providing what is most relevant to

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Minnesota agencies and government units. Table 5 below summarizes Accenture's approach to providing these outputs as it relates to the Service Levels specified in the RFP.

Defined Service Levels	Components	Accenture Approach
Reporting/Information Extraction	• Operational Reporting • Parameter Driven Reports • Pre-defined Queries • Pre-defined Data Cube(s) and/or Mart(s) • Pivot Tables	The strategic sourcing assessment process often involves combining data from various source systems into a single spend database or data cube. Assuming the information is available from the source systems, we can provide requested reports and/or extracts of data in a wide variety of formats.
Data Analysis	• Direct Access to Data • Economic and Financial Analysis • Data Cube(s) and/or Data Mart(s) creation • Ad hoc Queries • On Line Analytical Processing (OLAP) • Use of Business Intelligence (BI) tools	A spend (data) cube is a standard output of the sourcing assessment process and can be used to conduct a variety of ad-hoc queries as well as serving as the basis for specific economic and financial analysis. The spend cube can be made available and accessible to Minnesota resources if requested. If the project utilizes Emptoris, or similar tool, OLAP and BI tools may be available depending on the services included in the scope of work.
Advanced Analytics	• Clustering / Segmentation • Data Mining • Predictive Modeling • Advanced Statistical Analysis • Cause-Effect Validation	Advanced analytic techniques, such as the ones specified in the column to the left, are used as part of a strategic sourcing assessment if their use can drive increased identification, quantification, or prioritization of opportunities.

Table 5: Accenture Approach by Service Levels

4.2.4   Vendor Account Audits

Vendor account audits are one of the "quick win" techniques that Accenture utilizes to help clients generate and/or realize procurement benefits in a relatively short period of time without utilizing the full strategic sourcing process. Vendor account audits may be pursued for a variety of reasons such as: being an identified area of opportunity by a strategic sourcing assessment; a scheduled or ad-hoc review of a major supplier; or after identifying possible compliance issues with a vendor. In addition to vendor audits being pursued for a variety of reasons they may also be conducted with a variety of intents such as cost compliance or compliance to service level agreements (SLAs) and/or compliance to other contract terms.

Accenture utilizes the Vendor Account Audit Process in Figure 10 to efficiently conduct vendor account audits. Like the Strategic Sourcing Assessment Process this process is flexible and can be adapted to the specific needs of a project.
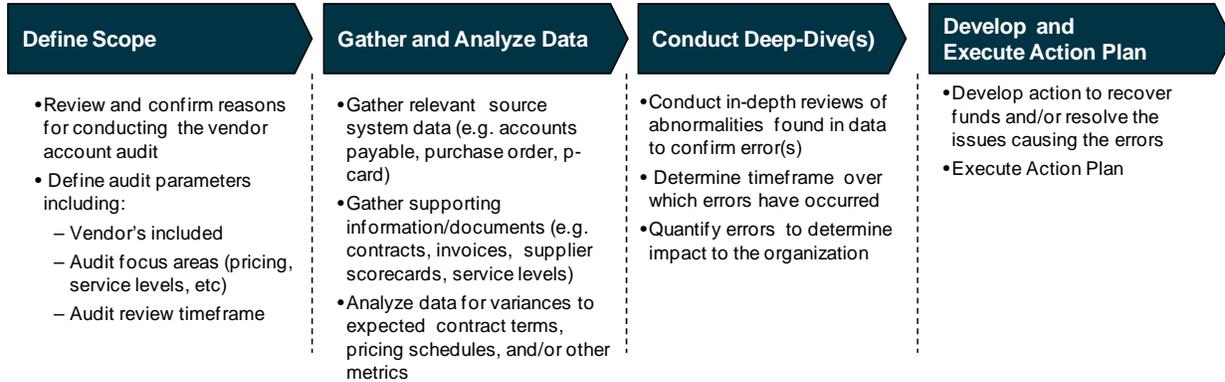
State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Define Scope	Gather and Analyze Data	Conduct Deep-Dive(s)	Develop and Execute Action Plan

• Review and confirm reasons for conducting the vendor account audit
• Define audit parameters including:
  – Vendor's included
  – Audit focus areas (pricing, service levels, etc)
  – Audit review timeframe
	• Gather relevant source system data (e.g. accounts payable, purchase order, p-card)
	• Gather supporting information/documents (e.g. contracts, invoices, supplier scorecards, service levels)
	• Analyze data for variances to expected contract terms, pricing schedules, and/or other metrics
		• Conduct in-depth reviews of abnormalities found in data to confirm error(s)
		• Determine timeframe over which errors have occurred
		• Quantify errors to determine impact to the organization
			• Develop action to recover funds and/or resolve the issues causing the errors
			• Execute Action Plan

Figure 10: *Vendor Account Audit Process*

Accenture recognizes that the specific vendor account audit needs of Minnesota organizations may greatly vary. Some organizations may pursue deep audits focused on just a few vendors while others may pursue broad audits of the majority of their vendor base; some may pursue historical audits based around profit recovery while others may pursue audits that are forward looking intended to proactively prevent errors. Accenture has experience and can help conduct numerous types of audits, according to the specific needs of any organization or project. Table 6 below provides an overview of the four main types of vendor account audits Accenture frequently assists our clients in pursuing:

		Descriptions	Benefits
Profit recovery	Historic Accounts Payable Review	• Simple process to detect and recover historic overpayments to vendors • Up to 36 months historic data reviewed • Single or multiple ERP systems can be analyzed • Focus on Accounts Payable transactions (no contracts, no pricing analysis) • Full service (analysis, claims, and recoveries) • Possible gain-share fee structure	• Speed to value • Quick assessment and business case • Fastest analysis to tackle recoveries
Profit recovery	Historic Contract Compliance Review	• Deep review of selected vendor contracts to detect & recover errors • Automated process using Accenture proprietary applications • Requires 'line item detail' from ERP and access to vendor contracts • Flexible review period and multiple ERP systems can be accommodated • Possible gain-share fee basis	• Potentially more value (4x) than AP review
Cost avoidance	Accounts Payable Payment Accuracy	• Design and implementation of proactive, prevention-focused process • Configurable to meet individual client requirements • Implementation of Accenture Assets on an ASP or service basis • Full functionality and claims management process	• Prevents AP errors…in advance • Improved control processes – fewer errors • Improved working capital utilization • 100% of potential recovery can be managed • Cost effective vs. historic cycle of reviews • Includes hosting & application maintenance
Cost avoidance	Vendor Compliance Management	• Design and implementation of proactive, prevention-focused process • Configurable to meet individual client requirements • Implementation of Accenture Assets on an ASP or service basis • Facilitates proactive ongoing vendor management • Full functionality and claims management process	• Manage Pricing and Allowances • Improved control processes – fewer errors • Improved working capital utilization • Proactive approach – challenge vendors • Cost effective vs. historic cycle of reviews • Typically includes hosting & application maintenance

Table 6: *Overview of Vendor Account Audit Types*

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Beyond the type of audits conducted, telecommunications is an area that is known to have frequent issues with expense and billing accuracy. This is due to several common challenges such as billing complexity, lack of inventory clarity, and emerging/changing technologies to name a few. Accenture has developed a group which focuses solely on identifying and addressing telecommunication expense management (TEM) challenges. Figure 11 below shows selected results from TEM programs executed by Accenture.
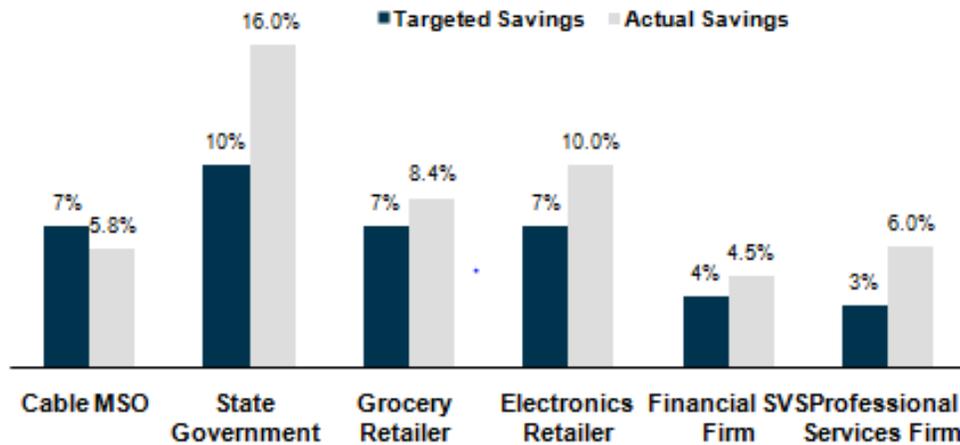
Figure 11: *Telecom Expense Management Results by Segment*

The results of a vendor account audit can differ significantly depending on the audit's scope. When the scope includes the audit of billing and payments (which most do) and errors are found, Accenture has found overages ranging from one to seven percent. There are a wide range of causes for these overages but some of the more common types include:

- Incorrect application of tax or regulatory fees
- Billing based on outdated or inaccurate pricing
- Not applying discounts or not applying the appropriate discount levels
- User input errors
- Not providing rebates when earned

These are just some of the more common types of errors Accenture discovers when conducting vendor account audits. Accenture has experience identifying dozens of other potential errors. This experience allows us to understand which errors to look for and how best to identify them, decreasing the time it takes to conduct audits and increase the amount of overages identified.

Accenture is committed to providing thorough vendor account audits to our clients in Minnesota which produce actionable insights that may translate into financial savings for Minnesota. Due to Accenture's broad capabilities and experience we are able to conduct these audits as independent programs or as part of a larger strategic sourcing or capability development

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

program. Accenture is also committed to providing the right service levels for all vendor account management projects. Table 7 below shows Accenture's proposed approach to meeting and exceeding the services levels defined in the RFP.

Defined Service Levels	Components	Accenture Approach
Reporting/Information Extraction	• Operational Reporting • Parameter Driven Reports • Pre-defined Queries • Pre-defined Data Cube(s) and/or Mart(s) • Pivot Tables	Accenture would provide Minnesota with the data extracts and reports generated from vendor account audits. As the audits increase in scope it becomes cost effective to utilize more advanced tools and applications to produce standardized, pre-defined reports, queries, data cubes, and more advanced reporting features (such as pivot tables).
Data Analysis	• Direct Access to Data • Economic and Financial Analysis • Data Cube(s) and/or Data Mart(s) creation • Ad hoc Queries • On Line Analytical Processing (OLAP) • Use of Business Intelligence (BI) tools	Audits which are large enough to make use of more advanced audit tools and applications typically include many or all of the data analysis components shown in the column to the left. For less advanced audits simpler tools and applications are typically used and often don't have many of the components shown in the column to the left. Accenture would bring the right set of tools to any vendor audit project to accomplish the objectives of the audit in a cost effective manner.
Advanced Analytics	• Clustering / Segmentation • Data Mining • Predictive Modeling • Advanced Statistical Analysis • Cause-Effect Validation	Accenture's vendor account audit process focuses on mining data to identify abnormalities and then understanding the cause and effect of those abnormalities through the deep dive step. Accenture may also use clustering/segmentation if needed to identify a group of vendors or products to focus the audit. Finally, predictive modeling and advanced statistical analysis may be used as part of action plan development or with audits that are proactive and intended to prevent errors before they occur.

Table 7: *Vendor Account Audit Service Levels*

4.2.5 State Involvement Necessary for Successful Implementation

The involvement of state, agency, and/or departmental resources is essential for a strategic sourcing assessment and/or vendor audit to be successful. We would anticipate, at a minimum, involvement from the resources shown below in Table 8 for any project we would conduct. Required Minnesota resource involvement could increase considerably if it is a large project or involves multiple work streams.

33

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Role	Description	Average Time Commitment
Executive Sponsor	Provide executive level decision making on key issues and sign-off on final work products	2 hours per week
Project / Program Manager	Provide day-to-day guidance on project issues and facilitate scheduling key stakeholder interviews	8 hours per week
Data Expert(s)	Provide data extracts from relevant source systems	8 hours per week
Key Stakeholders or Subject Matter Advisors	Participate in interviews to provide qualitative information on procurement processes and practices	2 hours per stakeholder

Table 8: State Resources Required for a Successful Implementation

4.2.6 Personnel

Accenture has delivered projects and integrated solutions in strategic sourcing and procurement analysis to leading companies and government organizations worldwide for over 19 years. Our teams bring specific and relevant category experience from completing over 400 client projects; Accenture currently has over 50 active sourcing and procurement projects in progress throughout the United States.

We have a dedicated team of resources who focus only on strategic sourcing and procurement related analysis and implementation projects. These resources include experts with rich background. For example, our Global Category Directors (GCDs) focus on specific individual categories across client projects and bring extensive category experience and real-time market knowledge to clients.

Each client, project, and scope of work requires a project team staffed with the right makeup of resources to deliver with the right expertise, speed to value, and price our clients have come to expect. Therefore, it is impossible to provide a list of resources that would be an appropriate list for all projects. However, we have provided examples of resources that are representative of resources we would expect to staff on a strategic sourcing analysis at the State of Minnesota:

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Resource	Project Role	Experience Summary
Dan Maschoff	Global Category Specialist	Dan has deep industry experience in travel spend management including strategic sourcing & procurement, custom category strategy development, project and resource management, supplier management, product development and service delivery. Dan has been with Accenture for nearly 4 years and is responsible for the delivery of travel sourcing and category management services to our clients, including Accenture's internal travel program managers. He has more than 20 years experience in numerous facets of the travel spend eco-system, including travel management services, end-to-end travel procurement transactional services and travel distribution technologies, as well as on the supply side.
Joe Crawford	Analytic Manager II	Joe is in the Global Supply Chain Management service line. He has focused on procurement since joining Accenture in 2003. He is experienced in many aspects of procurement including spend analysis, strategic sourcing, category management, workforce transformation, and low cost country sourcing. He has worked across various industries but has concentrated on work in the public sector spending over half his career at government clients. He has both led and been a part of numerous projects over the last seven years.
Rob Friess	Management Scientist (Strategist)	Rob is a Senior Manager with 14 years of experience within procurement operations and sourcing/category management. He has conducted procurement assessments, strategic sourcing activities, business process outsourcing, procurement merger assessments, and managed large teams at several clients. His areas of focus have been Government and Financial Services. Rob has led 4 of Accenture's largest procurement transformational programs. Additionally, he supports Accenture's High Performance Procurement Mastery research and workshops, and manages the Sourcing Analytic Center of Excellence.
Spencer Rosborough	Analytic Manager I	Spencer's areas of specialty are Strategic Sourcing, Procurement Transformation and Supply Chain Management Strategy having worked with a variety of clients to enhance their Supply Chain capabilities. His work has helped companies increase operating margins, improve asset utilization, reduce costs, mitigate risk and improve customer service.
Valerie Van Leuven	Analytic Manager II	Valerie has been with the firm for over 8 years, supporting and delivering sourcing and procurement transformation change projects in large organizations over the past 6 years. She has deep experience in strategic sourcing, category management and procurement transformation, having lead work streams in each of these areas. Valerie led several category teams during 18 months of the Pennsylvania project.
Sharla Cloutier	Analytic Manager I	Sharla is a Consultant in Accenture's Sourcing and Procurement Practice. Her focus areas are the Public Service and Financial Services industries where she has supported the delivery of a procurement outsourcing program and strategic sourcing savings.

Table 9: *Accenture Key Personnel for State of Minnesota Enterprise Data Analytics Program – Strategic Sourcing*

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35

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

4.2.7 Credentials

In addition to the relevant experience outlined in Section 4.2.1, we are providing two credentials which can be contacted. These credentials highlight our experience to perform strategic sourcing analytics.

Client / Project Name	New York State / Spend Assessment and Opportunity Analysis	
Services Provided	Accenture conducted an analysis of $8.0 billion in New York State Executive Agency Spending with the objective of identifying the areas or categories which were most likely to result in savings if strategically sourced. The Accenture Team worked with New York State resources to collect and analyze spend data (such as accounts payable data), review relevant contracts and invoices, and conduct interviews across the New York State procurement community. The analysis included classifying 3.8 million lines of spend data using proprietary tools. Upon collection and analysis of data from all sources opportunities from the 35 spend categories were quantified and prioritized to provide New York State with understanding of the possible savings and an actionable plan for Strategic Sourcing.	
Contact Information	Name of Organization: Name and Scope of Project: Dates of Engagement: Name of Contact Person: Email Address: Phone Number:	Department of Budget, New York State Phase 1 Spend Analysis and Opportunity Assessment 11/2010 – 03/2012 Patricia Billen patricia.billen@budget.state.ny.us (518) 474-4020
Efficiencies Gained	This was the first statewide analysis of spend ever conducted in NYS. Accenture assisted the state to complete the analysis in 10 weeks and the approach directly ties the 3-tiered taxonomy to the suppliers and object codes to easily facilitate future date refresh requirements. NYS estimated it would take 6 months to complete a comprehensive view of Procurement and Sourcing practices and opportunities.	
Cost Savings / Calculation	Cost Savings are Confidential to NYS	Cost Savings were estimated using a total cost of ownership model using a specific set of agreed to criteria.
Resolution of Disagreement over Savings	There were no disagreements in regards to savings estimated or fees owed during the course of the project.	
Determination of Responsibility	The goal of NYS followed an approach to attribute all of the savings to the NYS staff to eliminate a need to distinguish who earned what arguments. Accenture supported the project with a goal of providing skills transfer and knowledge sharing and providing a new methodology and process for strategic sourcing.	

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Client / Project Name	State of Texas Spend Pattern Assessment
Services Provided	During a period of slowed economic activity and decreased state revenue, the Texas Comptroller of Public Accounts (CPA) contracted with Accenture to perform a spend pattern assessment and make recommendations related to strategic sourcing, delegation authority, and organizational structure. The main driver for this project was the identification of potential areas for procurement savings and improvements. Over ten weeks, Accenture resources analyzed $134B in spend, targeted $3.5B as addressable spend and identified $252 – $539M in potential annualized spend savings. Concurrently, an analysis of statutes and policies was completed that mapped state analyzed spend data to the state's delegated procurement authority. Additionally, a high level organizational analysis was completed for the central procurement agency and several high-spend agencies. The primary objectives of the project were to: • Identify high value areas for strategic sourcing initiatives and recommend an initial approach • Identify policies and legislative statutes that could be negatively impacting efficient procurement and make recommendations on addressing the areas through legislative or other means • Identify opportunities for organizational improvements through adjusted organizational structuring or operating models

Contact Information	Name of Organization: Name and Scope of Project: Dates of Engagement: Name of Contact Person: Email Address: Phone Number:	State of Texas Spend Pattern Analysis: Analyze state spending patterns to identify opportunities to generate savings and develop an implementation plan to achieve the savings identified. 04/2010 – 06/2010 Sarah Whitley, Chief of Staff, Texas Comptroller of Public Accounts sarah.whitley@cpa.state.tx.us (512) 463-6180

Efficiencies Gained	Accenture worked with Comptroller personnel to identify spend from four systems, totaling $134B. This spend was analyzed by Accenture and focused down to $3.5B that was highly impactable by strategic sourcing by removing out-of-scope spend and low-value categories. Existing contracts were also reviewed and survey interviews conducted with CPA and agencies. The result was a projected annualized savings of $252 – $539M across 33 categories. For each category, Accenture provided spend analysis, vendor analysis, industry trends and best practices, as well as recommendations for sourcing the category. In addition, Accenture also categorized all suppliers into a common set of commodity classification designations. Accenture then recommended a wave-based strategic sourcing approach with optional accelerated start models for waves 2 and 3. Also recommended were standardization of strategic sourcing and savings methodologies, as well as the development of standardized templates to aid in the process. Accenture worked with Texas personnel to identify all legislative statutes and administrative policies that delegated procurement authority to agencies. A Delegation Matrix was assembled by plotting all statutory delegations by Agency and Category Taxonomy. Texas financial data provided a high level of detail with regards to how a particular

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Client / Project Name	State of Texas Spend Pattern Assessment	
	purchase was made. Accenture analyzed this data to determine the method of purchase for each Agency and Category. This was then combined with the above-mentioned delegation matrix. For each Agency/Category intersection, this effort created visibility for the first time into how much money was spent: • Against centralized, state-wide contracts • Against statutory delegations • Against policy delegations	
Cost Savings / Calculation	$252 - $539 million (Identified Savings)	Savings were calculated by taking the total spend, determining which portion could be impacted by sourcing (addressable spend), and then applying a savings range to that spend based on past experience and analysis information.
Resolution of Disagreement over Savings	There was no disagreement over identified savings.	
Determination of Responsibility	All savings identified were directly a result of the work performed by the Accenture Project Team. Texas State resources provided significant information which served as an input to the analysis but they did not perform the analysis to identify or quantify the savings opportunities.	

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

Appendix A   Resumes

ALEXIS PEREZ
Consultant

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Alexis is in Accenture's Supply Chain Management Practice focused on Sourcing and Procurement. Her area of specialty is Strategic Sourcing and Procurement Strategy, having worked with a variety of clients to enhance their Supply Chain capabilities including the State of Texas. Her work has helped companies increase operating margins, improve asset utilization, reduce costs, mitigate risk, and she is a marketing and print category specialist. She is a certified Six Sigma Green Belt and has received certification in the Six Sigma Strategic Sourcing Methodology.	• Strategic Sourcing • Procurement Transformation • Workforce Design • Strategic Sourcing and Category Management Training • Procurement Outsourcing • Project Management • eSourcing (eRFx, Reverse Auctions,) • Supplier Relationship • Management • Public Sector • Finance

EDUCATION
• University of Texas, Bachelor Science in Mechanical Engineering

RELEVANT DIRECT EXPERIENCE

UK Based Insurance Provider – Spend Assessment and Workforce Redesign
Alexis led an effort to redesign the client's procurement organization including developing the roles required to support sourcing and category management and workforce competencies. In addition, the team reviewed spend across indirect categories and determined areas of opportunity for savings through strategic sourcing.

State of Texas – Spend and Delegation Analysis and Opportunity Assessment
Lead

Alexis led the category analysis for a spend analysis and opportunity assessment. The team is also reviewed the existing legislation and recommending changes to better leverage buying power.

Regional Healthcare Insurance Provider – Sourcing & Procurement Optimization
Lead

Alexis led the Fleet, IT Software/Hardware and Software Maintenance sourcing categories, performed an assessment and category strategy for client's fleet vehicles, including recommendation of vehicle acquisitions and replacement schedules and provided a category assessment and strategy recommendations for third part print services.

US Based Financial Services Client – Strategic Sourcing & Procurement Outsourcing
Lead

Alexis led strategic sourcing for the Marketing and Print portfolio. She also provided training and assistance on Emptoris Spend Analytics/Sourcing Portfolio modules, and trained team members in establishing online RFx (s) and Auctions.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

BRANDON BRIGGS
Consultant

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Mr. Briggs is in Accenture's Sourcing and Procurement Practice. He has over 4 years experience in the Government sector, where he supported the delivery of multiple procurement systems, both domestically and abroad. Mr. Briggs has strong government procurement and contract management experience, as well as experience in related functional areas including transportation, receiving, and property management. He is supporting data analysis on our State of Texas project.	- Strategic Sourcing - Spend Assessment - Procurement Systems Implementation - Contract Management - Government Financial Management Systems - Client Knowledge Transfer / Training development - Functional System Design

EDUCATION
• College of William & Mary, BBA – Marketing with Operations and Information Systems

RELEVANT DIRECT EXPERIENCE

State of Texas – Spend and Delegation Analysis and Opportunity Assessment
Brandon supported a spend analysis and opportunity assessment. The team also reviewed the existing legislation and recommending changes to better leverage buying power.

United States Department of State – Overseas Contract Management System

Lead

Brandon served as the lead for the customization and implementation of a contract management module for overseas Embassies and Posts. This analysis included selection of the software, requirements gathering, design creation, system configuration, test, and piloting of the contracts management module with two Embassies. The software will be implemented at all necessary Posts by the end of calendar year 2011.

United States Department of State – Overseas Supply Chain Integration

Site Lead

Brandon served as site lead for multiple overseas deployments of the Integrated Logistics Management System, an integrated system that houses procurement, transportation, receiving, and property management capabilities for Embassies and Posts. Responsibilities included procurement process mapping, training and on-site support, enhancement design, as well as interfacing directly with Post management, including the Deputy Chief of Mission. Included locations in North and Central America, Europe, Africa, Australia.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

CASSIE D'AGATA
Analytic Project Manager

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Cassie D'Agata is a Manager with over 6 years experience supporting statistical analysis initiatives. Cassie's areas of expertise include Project Management, Analytics, Business Intelligence and Performance Management. Cassie brings strong problem-solving, analytical interpretation and communication skills and a successful track record of delivering high performing projects within scope and schedule.	• Analytic Project Management • Metrics Identification and Design • Enterprise Analytics • Business Intelligence

EDUCATION

- University of Virginia, College of Arts and Sciences, BA in Spanish, May 2001

RELEVANT DIRECT EXPERIENCE

Accenture, **LLP**
New York City Department of Finance
Manager, October 2010 – February 2011

- Project manager of analytics pilot for identification of property tax under-reporters, audit prioritization and remediation acceleration
- Managed team of resources responsible for designing, developing, implementing, and maintaining predictive statistical models using statistical modeling and data mining techniques to identify under-reporters
- Determined needed deliverables, macro approach, and project schedule/timeline
- Coordinated and assisted in the completion of all client deliverables
- Served as touch-point for all project matters and facilitated resolution

Accenture, **LLP**
Revenue Protection Lab (Internal)
Manager, August 2010 – February 2011

- Project manager for the development of an asset that utilizes analytics to identify and treat fraudulent behavior, which will be a customized offering for Tax authorities across the globe
- Managed a team of resources responsible for using combination of advanced analytics tools and techniques to optimize known fraud capture, identify "hidden" as well as "new" types of fraud, and cut down the overall data management, scoring and referral process to a fraction of existing
- Defined and ensured the successful implementation of solution requirements to include incorporation of:
  – analytics-derived models for identifying "known" noncompliance, anomaly detection and random audit via segmentation
  – workflow management of cases
  – real-time rule simulation and implementation
- Prepared solution for client demonstrations

Accenture, LLP
GBS (USPS)
Manager, August 2010 – December 2010

- Project Manager for a project focused on utilizing advanced analytic techniques to identify issues related to international mail service performance

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

CASSIE D'AGATA
Analytic Project Manager

- Managed team of resources responsible for designing, developing, implementing, and maintaining predictive statistical models using statistical modeling and data mining techniques to identify under-reporters
- Developed project and phase plans and estimates through negotiations with key stakeholders
- Managed the overall project schedule/timeline, critical path by deliverables, and productivity improvements using Accenture's program management methodologies, as required
- Coordinated and assisted in the completion of all client deliverables
- Served as touch-point for all project matters and facilitated resolution

Accenture, LLP
HHS-Connect (NYC Department of Information Technology & Telecommunications)
Manager, February 2009 – August 2010

- Performance Mgmt/BI Specialist responsible for mapping NYC Citywide Performance Reporting metrics for health and human services to the Deputy Mayor of Health and Human Service's outcome model (mission and operational effectiveness outcomes)
- Worked with HHS executives to develop an approach for using the HHS Outcome model and metrics to determine whether HHS should pursue projects, and to measure the value delivered by the projects being implemented
- Coordinated with the team developing business cases for HHS projects to determine how that work and the HHS Outcome model work align with one another to measure overall program effectiveness
- Developed Analytic Framework to inform HHS-Connect Business Intelligence Roadmap. (Includes short and long-term recommended activities to implement Business Intelligence and Analytics capabilities)

Analytics, LLP
3-1-1 Analytics (NYC Department of Information Technology & Telecommunications)
Manager, September 2007 – September 2009

- Lead 3-1-1 Analytics GIS Designer
- Gathered and documented application requirements from business owners and agency representatives for the integration of GIS maps, Center of Economic Opportunity (CEO) program metrics, SCOUT achievements and WebTrends data with Analytics dashboards
- Served as a liaison to the city's GIS team to ensure coordination across teams
- Involved in planning for the long-term GIS solution (integration with Oracle MapViewer)

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

CHRISTOPHER CHECCO
Analytic Strategist

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE

Chris is the Chief Analytic Strategist within Accenture's Public Service Analytics practice. He is a recognized thought leader in the area of Applied Advanced Analytics across both the public and private sectors. He has developed numerous white papers on a variety of advanced analytic topics and has participated in several webcasts and speaking engagements.

Chris is responsible for leading the analytic strategy for Accenture's fraud detection pilot projects with both the Ireland Revenue Commissioners and the NYC Department of Finance.

Key areas of expertise include:
- Fraud Detection
- Risk and issue Mitigation
- Multiple Large-scale Analytic Non-Compliance and Financial Risk Solutions
- Experience with integration of analytics with operational support systems
- Design, Develop, Deploy mission-critical analytics solutions

EDUCATION

- Bachelor of Arts, Pace University, 1996
- International Executive MBA, Georgetown University, 2005
- PMI Project Management Professional (PMP), 2002
- Fundamentals of Project Management, Villanova University, 2002

RELEVANT DIRECT EXPERIENCE

Accenture
Analytics Lead, January 2005 - Present

Public Sector
Key Advisor, February 2010 - Present

Delivered the following results for Public Sector Organizations:
- Management Scientist focused on the application of advanced analytics in the Public Sector
- Leading the design and creation of analytic solutions across the areas of revenue protection, insider threat, and cyber security
- Architect the "art of the possible and the practical" by transforming vast volumes of disparate data into business insights to drive value, reduce costs, and mitigate risks through the application of advanced analytics
- Manage teams which leverage a variety of statistical algorithms and methodologies against both structured and unstructured datasets to uncover trends, attributes, behaviors, and hidden relationships
- Work with the strategic portions of the business, operations, and information management groups to understand the core issues that are plaguing today's organizations
- Interface with the tactical counterparts within the organizations to ensure the efficacy of the solutions, tailor outcomes, as well as to create repeatable, practical solutions

Public Sector

President of Analytics Division and Operations Director, January 2005 – February 2010

Department of Homeland Security, August 2009 – Feb 2010
Led a team of up to 10 analytical resources (statisticians, data analysts, text miners, link analysts, etc.) at supporting proactive identification of non-compliant activities; this included the design and creation of an analytical entity-based data store of hundreds of millions of individuals, groups, and corporations.

Delivered the following results for the Public Services/Commercial sector clients:

accenture

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

CHRISTOPHER CHECCO
Analytic Strategist

- Led a team that **leverage advanced analytics to identify non-compliance schemes for the 100 million transactions** that occurred annually

- Successfully implemented **SAS, Oracle, and Link Analysis Tools** across disparate data sources to perform analysis

- Coordinated analysis efforts with intelligence analysts and other operations SMEs to derive key drivers and **review performance of existing business rules**

- Designed a solution to **provide real-time scoring of hundreds of thousands of daily transactions and inform downstream case management systems**

- Architect for solution to leverage dashboards, analyst tools and GIS interfaces to **maximize detection of non-compliance and discovery of emerging schemes**

- Responsible for managing a $17 million P&L (est. 2009), major account development, business continuity and labor management (40+ resources)

- Devise processes and systems to measure key metrics, proactively address business risks, and aid in positively impacting the P&L

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

DAN MASCHOFF
Global Category Director

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Dan has deep industry experience in travel spend management including strategic sourcing & procurement, custom category strategy development, project and resource management, supplier management, product development and service delivery. Dan has been with Accenture for nearly 4 years and is responsible for the delivery of travel sourcing and category management services to our clients, including Accenture's internal travel program managers. He has more than 20 years experience in numerous facets of the travel spend eco-system, including travel management services, end-to-end travel procurement transactional services and travel distribution technologies, as well as on the supply side.	• Strategic Sourcing for all travel sub-categories including primary spend areas of air, lodging, ground and travel agencies • Category Management for all travel sub-categories • T&E Payment Cards • Meeting, Event & Incentives • Travel Policy and Compliance Systems • P2P Travel Systems • Travel Technologies • Public Service • Products • Retail Finance

EDUCATION
• Northwestern University, Master of Science in Transportation • University of Wisconsin, Bachelor of Science in Geography

• RELEVANT DIRECT EXPERIENCE

Multiple Clients

Global Category Director for Travel

Dan develops category strategies based on best practice for cost-effective travel spend management including via offshore capabilities. Dan also defines practice scope including spend analytics, sourcing systems, compliance tracking and savings methodologies and established key demand management procedures to impact travel spend through behavioral change management.

Multiple Clients

Travel Team Lead

Dan manages delivery resources teams to provide increased value from Travel Sourcing and Category Management services to procurement clients. He delivers executive level presentations to drive adoption of best practices and change management and leads complex negotiation teams targeting strategic suppliers.

Internal Accenture Client- Strategic Sourcing

Dan leads global project teams in procurement of more than $750 million in travel spend including airlines, corporate jets, transient hotels and corporate housing, car rental, meetings and event management services, travel agencies, online self booking tools, global distribution systems and risk management services. This includes setting strategic objectives, supplier selection methodologies, implementation and change management planning and operational.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

DAVID L. SCHWARTZ
Analytic Solutions Architect

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
• Senior Solutions Architect with a background in data modeling and information management, ability to work with upper level management for requirements analysis, translating business needs into technical requirements. • Software selection and vendor evaluation, product compliance analysis for software packages in business intelligence, database systems, analytics platforms, and emerging technology standards. • Data integration strategies, information sharing based on standards based data exchange, data warehousing, ETL, and SOA solution design. • Technical leadership, team-based development, client/server development, RDBMS design and development for business intelligence applications. • Leadership and training in the area of advanced analytics and data mining, developing and implementing business solutions using data analysis and statistical techniques.	System Experience: • *Software / Products*: SAS Enterprise Miner – Expert • SAS Programing – Expert, SAS EBI – Expert, SAS ETL Expert, SAS AMB – Training, SAS SPM – project experience, Oracle – project Experience, DB2 – project Experience, UNIX – project experience, Teradata – project experience • *Development Tools / Languages*: SAS -- expert, SQL -- expert, Java – project experience, C++ -- training, • *Hardware / Operating Systems*: AIX -- project experience, Solarix -- project experience , Windows -- project experience, OS/390 – project experience • *Middleware / Databases*: Weblogic (Oracle) -- project experience, Apache Tomcat -- project experience • *General Tools*: ERWIN -- project experience, Vision -- project experience, MS Project -- project experience, Visio

EDUCATION
• Indiana University, Bachelor of Arts -- Political Science • Drury College, Bachelor of Arts – History • University of Nebraska, Masters of Arts – Political Science

RELEVANT DIRECT EXPERIENCE

Accenture
Global Markets Analytics, Health & Public Service
Analytic Solutions Architect (Manager)

Serving as Senior Analytics Solution Architect and focusing on product manageemnt for fraud, waste, and abuse offering and assets. Assisting the development of approaches and methodologies for anlyzing data and creating actionable business value. Assisting various client account teams in understanding how to organize data efficiently for analytics.

Deloitte Consulting, LLP

Analytics Lead, 7 Months
Implemented the Managing with Analytics approach to health plan operations for a large health plan provider. Acted as the lead for a team of analysts guiding several projects to completion. Particpated in requirements and design activities for an enterprise SAS BI implementation. Developed approaches and methodologies for anlyzing data and creating actionalbe business value. Assisted client management in understanding how to organize data efficiently for analytics. Used and trained staff on SAS Enterprise Guide, Enterprise Miner, and Base SAS programming.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

DAVID L. SCHWARTZ
Analytic Solutions Architect

UK Government Agency

Technical Advisor

Liaison and technical advisor to the team as they worked with SAS, ESRI, and Teradata to produce a live technical proof of concept for their mutual client. The project was delivered on time and was presented in conjunction with the pre-sales teams of each vendor to multiple audiences. The projects lead to the client letting a contract to lead a full procurement and requirements effort worth 888k GBP. Established a core group of architects capable of working with the vendors on future engagements and helped begin a training strategy for the UK Information Management team through the SAS offices in the UK.

Architecture BASS - Public Services Solutions Group Business Development

Soultion Developer/Business Developer

Worked with other subject matter experts from various industry segments and geographies to formulate a cooperative environmental sustainability solution. The cooperative organization that developed focused on compliance and assessment of environmental risk and relied on business solutions for developing measurement frameworks and portfolio management to support environmental strategies. Developed systems for understanding and managing environmental compliance based on national and international standards and reporting frameworks. Received Compass Award for outstanding achievements for his efforts on this project.

Large Automotive Manufacturer System Analysis

Systems Architect

Provided a comprehensive report to the Warranty Analysis Division of their issues reporting and analysis system which was built using SAS. The report provided an assessment of the infrastructure, data management, and governance of reporting process and procedures. The report was written after extensive interviews with division managers and review of systems documentation and report level code.

Federal Civilian Agency Data Strategy Analysis

Business Process Analyst

Conducted interviews with key stakeholders on the topic of data strategy and worked closely with the team that produced an extensive review of the agency data strategy for financial systems which included a gap analysis for systems based on OMB 300 requirements. Provided for the client summaries of key federal and agency documents that directly affected data management policy. These interviews were also the basis for a business process model of the financial systems in the agency which the team delivered to the client. Acted as the primary author on a data strategy recommendation that was delivered to the SVP.

Technical Environment: Visio

DOD Joint Service Agency Information Sharing Pilot

Solution Architect

Lead Architect on a SOA information sharing pilot for a DOD Agency demonstrating exchange standards. Acted as a primary author on the data strategy document outlining the data exchange concept of operations. Wrote the original XML Schemas for data exchange web services based on data exchange taxonomies which the client developed. Worked on a design team to produce system design documents and developed functional requirements for information sharing pilot. In addition, helped establish the governance around data exchange standards and provided product evaluation of data sharing/integration vendors.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

DAVID L. SCHWARTZ
Analytic Solutions Architect

Health Plan Providers and Healthcare Providers Imformation Management Projects

Technical Lead/Team Manager

Developed dynamic XML adapters for integrating capacity planning data at DISA and used XML to provide MS Office integration with DB2 queries for reporting. He also acted as the technical lead on a performance management system for the Yale New Haven Health Systems using SAS balanced score card tools. Designed and deployed an application to query census data for US Census Bureau using SAS and CGI. Helped develop a solution offering for performance based budgeting partnering with the SAS Institute, and developed an information sharing strategy using Teradata, BEA enterprise service bus and web services for a purchase card fraud proposal, and acted as solution architect for the FDIC Shared National Credit RFI using XBRL data sharing standards which resulted in SRA being down selected for an eventual RFP response. Managed a team of developers who developed advanced fraud detection models and deployed them on to client production UNIX systems for clients in the Blue Cross Blue Shield of SC network as well as development of analytical modeling for Blue Cross Blue Shield of Texas claims processing division. Worked with EA and infrastructure teams to develop a solution for service level management based on the ITIL framework.

Health Plan Provider Information Management for Acturaial Dept. and IM Group

Developer

Acted as technical lead for several large data migration projects in the Health Insurance market and consulted with clients to determine requirements for actuarial and claims reporting for both BCBS FL and BCBS MA.   He developed web enabled applications for reporting using SAS, Perl/CGI and JavaScript. Provided assistance on using the UNIX environment and SAS/Connect for remote parallel processing on an SMP midrange IBM servers improving efficiency and taught basic SAS programming and ETL. Used ERWIN to develop data models of both source systems and target dimensional models in ETL process while developing a physical and logical architecture for a dashboard application and supporting data marts. He created SAS/Connect programs on Mainframe to off load SAS data sets to UNIX environment and created SAS data sets using SAS/Access to DB2 SQL pass-through on Mainframe.   Primary developer on a Client/Server application for Ad-Hoc reporting needs using SAS/Connect and SAS/AF and also produced and tuned SAS applications summarizing files with more the 180,000,000 observations. While at BCBS he taught Web enabled programming and wrote technical documentation for applications being migrated to help desk.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

JOE CRAWFORD
Strategic Sourcing Lead

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Joe is in the Global Supply Chain Management service line. He has focused on procurement since joining Accenture in 2003. He is experienced in many aspects of procurement including spend analysis, strategic sourcing, category management, workforce transformation, and low cost country sourcing. He has worked across various industries but has concentrated on work in the public sector spending over half his career at governement clients. He has both led and been a part of numerous projects over the last seven years.	• Project Management • Procurement Opportunity Assessments • Strategic Sourcing and Category Management • Workforce Transformation • Client Knowledge Transfer / Training Development • Supplier Relationship Management • Procurement Data Warehousing • Government Procurement Process Redesign • Low Cost Country Sourcing • Public Service • Retail • Industrial Equipment Finance

EDUCATION
• Gettysburg College – Bachelor of Arts in Business Management

RELEVANT DIRECT EXPERIENCE

State of Texas – Spend Assessment
Project Manager

Served as the project manager for a comprehensive spend assessment conducted for the State of Texas. The project successfully met its goal of understanding state spending patterns, identifying procurement opportunities, and providing a plan for Texas to achieve the identified benefits.

State of North Carolina – Spend Assessment
Project Manager

Served as the project manager for a preliminary spend assessment conducted for the State of North Carolina. The project successfully met its goal of understanding state spending patterns, identifying procurement opportunities, and providing a plan for North Carolina to achieve the identified benefits.

US Department of Health and Human Services – Strategic Sourcing
Category Lead

Strategically sourced temporary administrative and medical staffing for the entire department. Led a procurement data warehousing initiative aimed at developing a business plan to implement systems which would allow the Department of Health and Human Services to understand their spending through easy access to relevant procurement data.

Commonwealth of Pennsylvania – Strategic Sourcing
Category Lead

Joe served as a category lead for three categories which led to the achievement of over $80 million in savings in the first year. In addition Joe worked to develop the methodology for successfully implementing newly sourced contracts to achieve high compliance levels.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

KARLA J. HULETT
Revenue Collections & Fraud Specialist

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Karla's career in tax and revenue administration spans 31 years, including 22 years in executive roles and she is presently a Director in Accenture's Tax Practice responsible for business development. She spent four years leading Microsoft's Tax and Administration Industry Unit, responsible for market strategy and pre-sales. Karla was formerly with the Kansas Department of Revenue for 21 years, culminating her career as Cabinet Secretary of Revenue from 1998 thru 2000.	• Transformational leadership • State tax administration expert • Project Management • Public Relations

EDUCATION

- University of Kansas, Bachelor of Science in Accounting, 1980
- Project Management Institute Certified Project Manager, 2008

• RELEVANT DIRECT EXPERIENCE

Accenture, LLC
Director Business Development - 2006- Present

Tax and Revenue Industry
I am responsible for the U.S. Public Sector market and solution strategy for government tax and revenue. Key responsibilities include

- Consult with state and local government officials about the future direction of tax administration and viable technology solutions to business problems
- Provide guidance and input into patent-pending high performance process excellence asset, a full documentation of world-wide tax administration processes and enabling technology
- Develop revenue practice market re-branding strategy, messages and campaigns
- Lead Accenture virtual sales teams during opportunity qualification and proposal response
- Work with solution providers (SAP, Oracle, RSI, Teradata, ETC.) to determine best overall solution when responding to state procurements
- Develop thought leadership for tax solution market through whitepapers, industry analysts consultations and presentations
- Participate in tax administration and other government technology conferences

Microsoft Corporation
Director of State and Local Tax Sales, 2002- 2006

I was responsible for the US Public Sector market and solution strategy for government tax, revenue, financial and human resource solutions. Key responsibilities include

- Consult with state and local government officials about the future direction of tax administration and viable technology solutions to business problems
- Consult with solution providers about market opportunities and determine which solutions to make investments for converting to Microsoft platform
- Consult with Microsoft account executives on strategy for tax solution opportunities and account plan development
- Develop thought leadership for tax solution market through whitepapers, industry analysts consultations and presentations
- Consult with Public Sector Marketing to develop annual plan
- Attend tax solution and other government technology conferences
- Host tax customer at Microsoft events

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

KARLA J. HULETT
Revenue Collections & Fraud Specialist

Accomplishments:
- Developed "Go to market" strategy for state and local tax solutions
- Grew market share from 10% to 65% for .NET development in tax agencies
- In 2006, over 90% of tax solutions awarded used the Microsoft platform

Computer Sciences Corporation
Director of Business Transformation, IRS Business Systems Modernization Program 2000 – 2002

The IRS Business Systems Modernization Program is a 10-year, $4 billion program to modernize the entire IRS. The program consists of multiple projects with multiple releases to implement a new Enterprise Architecture. Over 400 CSC and subcontractor staff was involved. I reported directly to the CSC Program Executive, supervising business transformation program activities. The critical challenge in this role was to ensure continuity and integration of business domain architecture across multiple project and technology releases. Key responsibilities included:

- Development and management of the business architecture for the modernized IRS. This includes processes linking IRS strategic planning initiatives with the transition strategy and guiding business reengineering tasks of all projects through an architecture certification process.
- Providing integration services (process, organization and location) across multiple projects and releases for the program for all business domains
- Developing transition management direction for the IRS Business and Functional Operating Divisions and the Information Technology Services Division. This process guides work to organize, train and achieve the business case goals.

Accomplishments:
- Expanded the overly narrow technology focus of the CSC PRIME Alliance, thereby increasing credibility with IRS executives by providing tax administration expertise in planning and executing the program.
- Designed and implemented the Business Transformation Program Office. This activity included selling the concept, developing the startup plan and hiring staff.
- Developed, gained approval and rolled out a comprehensive set of standards to guide multiple projects and IRS business units through the transition to systems implementation.

Kansas Department of Revenue, 1980 –2000
Cabinet Secretary of Revenue, 1998 – December 2000

I was responsible to Governor Bill Graves and the Kansas Legislature for the administration of the Kansas Department of Revenue:

- 1,200 central office and field employees with a budget of over $70 million
- Serves 2 million individual and 200,000 business taxpayers
- Collects over $5.5 billion in tax revenue
- Oversees the valuation of $18 billion of property
- Titles and registers 1.9 million motor vehicles, licenses 1 million drivers
- Controls all liquor and tobacco entering the state
- Four operating divisions; Tax Operations, Alcoholic Beverage Control, Property Valuation, Motor Vehicles supported by information technology, legal, policy and research and resource management staff

Accomplishments:
- Successfully completed Project 2000, a 5-year business transformation and information systems

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State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

KARLA J. HULETT
Revenue Collections & Fraud Specialist

project that enhanced revenues by $300 million and improved service delivery performance by as much as 90%

- Reduced staff by 15% while absorbing a 25% increase in workload compared to1995
- Achieved a leadership position for Kansas in e-taxation (ranked number one in the nation by *Government Technology*)
- Turned around public perception using a public relations plan that included public involvement in advisory councils, a media campaign and weekly performance reports to the legislature

Division Director of Tax Operations,
Director Project 2000, 1995-1998
Reporting to the Secretary, responsible for both the Division of Tax Operations and Project 2000

- 550 central office and field employees and with a budget of over $23 million
- Four line organizations; Channel Management, Customer Relations, Compliance Management, Enforcement are supported by central systems administration support, customer education and new systems development
- Project 2000 team included over 100 consultants from 5 different contractors with a budget of $65 million

Accomplishments:
- Reengineered business operations that achieved the vision of putting the customer (taxpayer) first by developing and implementing a blueprint
- Implemented new technology infrastructure and new business applications to support e-taxation, imaging, data capture remittance processing, single-point of contact, risk based account management, compliance case management, workflow and online policy library, management data warehouse
- Transformed organizational culture to be team-based and customer-focused by hiring all new managers and team leaders, redesigning jobs, reassigning 550 staff members based on competencies and retrained managers, leaders and team members to achieve performance expectations
- Established a Learning Center to support the human side of the transition by developing custom training and delivering over 100,000 hours of education

Other Responsibilities and Accomplishments for Kansas Department of Revenue
- 1998-2000 – Member of Information Network of Kansas Board of Directors
- 1998-2000 – Member of the Information Technology Council for Kansas
- 1998-2000 – Member of the Multi-State Tax Commission Executive Committee
- 2000 – Served as a key advisor to the Streamlined-Sales Tax project as the State of Kansas was accepted as a pilot stat.
- 1995-2000-Regular speaker at annual Conference of Federation of Tax Administrators (FTA) on the concepts and operational challenges related to a move to customer-focused tax administration and risk-based tax enforcement.
- Consulted to the states of Hawaii, Wisconsin, Arizona, Florida, North Carolina, and Utah, while serving in Kansas.
- 1994-1995 – Business Process Reengineering Manager; supervised and completed the procurement for Project 2000 (led task force, developed RFP, evaluated the responses, selected contractors and negotiated contract).
- 1993-1994 – Business Tax Bureau Chief; managed a staff 105 responsible administering 25 Kansas business taxes performing customer registrations, account management and auditing.
- 1993-1994 – Participated in the first KDOR strategic planning process, selected consultant and

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

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Revenue Collections & Fraud Specialist

reviewed final plan before it was published.

- 1992-1995 – Kansas Quality Management Coordinator for the Department and member of Statewide Planning and Guidance Committee that implemented TQM statewide.
- 1983-1993 – Quality Control Bureau Chief; managed 140 full time and 50 part time employees performing returns processing and revenue accounting for over 60 taxes and fees collected by KDOR. Reduced staff by 25% and increased accuracy to over 97% from 40%.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

MARC SOTKIEWICZ
Account Director

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
For more than 20 years, Marc has helped clients build business results through improved workforce capability. His clients have incorporated technology, organization, culture, work and business process outsourcing as well as talent solutions. Marc leads Human Capital Analytics; Accenture's global offering to drive maximum performance and business impact by the use of data and workforce analytic methods. He holds multiple patent applications for new workforce analytic techniques.	• Workforce Strategies • Service Delivery and Outsourcing • Business Transformation and Change • Management • Human Capital Analytics • Workforce Effectiveness and Contractor Management

EDUCATION

Wabash College, Bachelor of Arts, 1980

RELEVANT DIRECT EXPERIENCE

Accenture

Marc has over 20 years of client experience in Europe, North and South America. His solution, negotiation, business transformation and program leadership experience is best shown by his client projects of the last several years.

- Served as the HR service delivery project lead for the largest municipal government in the world
- Served as the HR consulting lead for the largest electronics retailer in the world
- Served as HR service delivery strategy lead architect for the Fortune 1 retailer
- Developed and launched the new HR service delivery, transformation and HR technology strategy for a Swiss-based, four-continent pharmaceutical firm as part of a corporate restructuring to eliminate $600M in annual spend
- Led seven HR and finance transformation projects with total savings targets over $100M at a $12B US retailer. Initiatives included compensation and benefit delivery optimization, BPO rationalization, program simplification and HR role implementation
- Guided the strategy team at a +$50B international energy company to develop a third generation finance outsourcing strategy for +$300M in BPO spend
- Led the strategy, design and implementation of HR and finance shared services for the second largest private corporation in Brazil and for the South American operations of a global food and beverage manufacturer and distributor
- Served as HR PMO lead for a three-continent, 70-member global team at an 85,000 employee Silicon Valley manufacturer. Developed the company's first global HR service delivery operating model, including the business case and process strategy for the HR shared services
- Led the development, business transformation and start-up of HR shared services at a top-10 US banking company, including implementation of a call and transaction service center, HR product centers and a new business partner role. An acquiring institution of equal size adopted the entire transformed HR operation within one year of the merger

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55

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

MOCTAR DATT
Statistician

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Mr. Datt is a driven executive supported by progressively responsible experience across 10+ years in the statistical, data mining, and web analytics industry. He has broad range of experience in translating complex business questions into appropriate models, Web Intelligence and leveraging Online and Offline data, and delivering the best in class analytics capabilities with SAS and SPSS technologies. Mr. Datt served as the lead Statistician on Accenture's NYC Department of Finance RPIE Tax Collection Analytics Pilot.	• Statistical Modeling and Analysis • Strategic Business Intelligence • Web Analytics Expert • Data Mining • SAS and SPSS

EDUCATION

- University of California LA, PhD. Biostatistics, June 2000
- University of California LB, Master of Sciences Applied Math, June 1996
- University of California LA, Master of Sciences Biostatistics, June 1997
- Senegal, Bachelor of Science Mathematics (with Honors), July 1991
- Leadership and Communication Program, Harvard Business School

RELEVANT DIRECT EXPERIENCE

Accenture, LLP
Management Scientist (Statistician), August 2010 – Present
HR Analytics (Internal)
- Provide a common definition of analytics
- Identify HR analytics opportunities within the Talent Supply Chain an prioritize them based on indicative business case
- Conduct proof of concept on ability to unlock value on the top opportunities
- Build business case for detailed project phases

NYC Department of Finance RPIE Tax Collection Fraud
- Recommended proper analytic approach for statistical model development for fraud detection. subsequent recommendations as to the analytical approach.
- Developed, tested, implemented, and maintained statistical models.
- Interacted with clients of all levels to review expected outputs, applicability to business challenges, and model measurement.
- Guided the data formulation process including identification of attributes, exploratory data analysis, data transformation, and temporal layout.

Decision Consultancy Group LLP
Managing Director, December 2009 – August 2010

- Lead the delivery of predictive analytics projects and develop go to market strategies
- Build proposals to articulate how predictive analytics can be applied to specific business verticals
- Develop alliance partnerships and a highly profitable revenue model that leverages offshore resources
- Currently manage the design and implementation of a custom solution for identifying intrusive traffic

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

MOCTAR DATT
Statistician

from computer networks. The solution utilizes Text mining, machine learning algorithms and SOA
- Created a framework to integrate data mining solutions into complex business processes using SOA

Sears Holding Co.
Director Of Online Business Analytics, June 2008 – November 2009

- Worked with General Managers to develop Omniture tracking strategies for enhanced customer experience and consumer behavioral patterns
- Managed metrics implementation and requirements across Sears Online Services web sites.
- Led the development and execution of models to improve service attach penetration by 500bps. Built a cross functional team of Database analyst, Site operations analysts to support analytics requests
- Worked with User Experience and Marketing team to develop strategies for improving conversions
- Designed forecasting models using ARIMA to better align sales plans with forecasts
- Led the development of Consumer behavior database by integrating Omniture data, customer purchase history and web survey data
- Served as the Online services Analytics Champion in a cross functional team aimed at discovering novel methodologies for leveraging Sears Holding's Online and offline data assets
- Managed all analytics related requests and assigned resources as appropriate
- Implemented and analyzed Foresee results survey questionnaires across all Online Services web properties

Earthlink Inc.
Director Of Marketing Analytics, January 2007 – July 2008

- Led a team of analysts and served as the Predictive Analytics evangelist company-wide
- Interfaced with Senior Executive from Product Marketing, Sales and Customer support to provide guidance on how to map strategies with modeling initiatives
- Supported tactical initiatives and designed analytical roadmaps with defined success metrics across sales and marketing departments
- Led the development of Segmentation models, Cross-sell/Upsell, and Retention
- Designed the LPV model for EarthLink which generated over $10Million in revenue. Model lift with test
- campaign was 300% in first 2 deciles
- Managed the implementation of Siebel Analytics and Siebel Marketing for campaign optimization
- Introduced a notion of universal contact strategy designed to improve customer retention and prevent over-saturation of prospects
- Streamlined online marketing spend by introducing an optimization process which cut CPM spending by 33%
- Managed vendor relationships and established priorities according to guidelines
- Introduced novel techniques for analyzing churn and measuring marketing programs ROI
- Coached and developed analytical staff

SPSS, Inc
Senior Data Mining Solutions Architect, October 2004 – December 2006

- Designed and implemented a large scale customer Segmentation for a major US internet service provider and uncovered new market opportunities
- Designed model requirements and analysis plan for Basel II projects using Pillar I requirements from Basel II revised framework
- Implemented a Risk Weighted Asset model for a major Canadian Bank. Helped reduce economic capital allocation for Mortgages and Revolving credit cards

Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this document.

57

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

MOCTAR DATT
Statistician

- Led the development of a Statistical model at a Major Automotive company and reduced time to awareness of product defects from 24 weeks to 6 weeks. Model generated over $5,000,000 dollars in savings
- Successfully managed complex projects requiring expertise in CRM, data mining and Data warehousing, to build enterprise wide analytics
- Serve as expert architect in complex solutions spanning extraction of textual information and integration with CRM applications such as Siebel Systems
- Served as lead developer of solutions for Basel II regulatory and economic capital for SPSS Alliance Partners
- Participated in regular calls with account executives to help define Solution Development Prompters
- Currently implementing a loan approval model using Neural Networks, for a Mortgage company in the Chicago area. Model will help supplement existing business rules, and is expected to result in a reduction of defaulted payments by 35%
- Designed and led the implementation of Actuarial pricing model for a major US Automotive Insurance company Used a combination of Poisson, Gamma, and Tweedie distributions to implement pricing models.
- Models are currently being rolled out to production and will be used to replace existing pricing system. 75% increase in claims processing is expected by end of 2007.

SPSS, Inc
Senior Data Mining Consultant, October 2000 – September 2004

- Designed a predictive analytics solution for a Major US wireless Telecommunication and increased retention by improving target rate for churners by 80%. Model generated over $4,000,000 dollars in revenue.
- Implemented a Neural Network fraud detection solution for a Middle Eastern wireless company. Increased fraud detection rate by 65% with very low false positives.
- Designed and implemented a Marketing analytics solution at a major US automotive company, with Integrated Siebel analytics and Siebel Marketing. Helped reduce time to deployment of acquisition campaign while increasing accuracy by 75%. Integrated Clementine Neural Network models into Siebel's Smartscript engine and integrated solution within UAN framework.
- Implemented a segmentation model at a large US investment bank and created profiles of financial advisors into a concept of Buying unit. And developed a predictive model aimed at discovering FAs most likely to redeem key mutual funds. Model predictive accuracy was 87%.
- Advised a large insurance company on Fraud detection best practices. Developed a pilot that will be rolled out in Brazil. The pilot will help them eliminate manual handling of claims and reduce claims processing time by 45%. The pilot used a combination of decision trees, Neural nets and Logistic Regression for scoring. The entire solution was deployed in a J2ee application framework to allow near real-time scoring of fraudulent claims.
- Served as SPSS internal expert on Siebel related applications and CRM integration.

PERKS.COM
Data Mining Engineer, June 1999 - July 2000

- Designed and implemented custom web reporting portal and improved site usage statistics and made recommendations for site redesign
- Performed statistical clustering of site usage patterns using K-Means algorithm.
- Conducted sequential navigation analysis on eCommerce sites and identified key reasons for shopping cart abandonment.
- Wrote custom algorithms in Perl for parsing of IIS web logs, and increased reporting accuracies by 45%.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

MOCTAR DATT
Statistician

- Performed gap analysis between web trends and custom reporting tool, and proved reporting anomalies in web trends.
- Wrote SQL stored procedures and ASP scripts for scheduled reporting, and improved company-wide reliance on new reporting metrics.

UCLA Neuropsychiatric Hospital/ UCLA Genetics Department
Graduate Research Assistant, June 1997 - May 1999

- Performed statistical analysis on data from UCLA Micro-array core facility, designed models from first principles using Bayesian framework and wrote computer programs to draw from posterior distributions.
- Tested models for gene differential expression inference and performed experimental design to obtain variance estimates.
- Processed large data and wrote a C++ engine for the extraction of pixel intensities from Affymetrix gene chip images.
- Implemented a clustering algorithm using fuzzy sets and used cluster membership to uncover gene functions in brain tumors.
- Advised physicians on sampling techniques and statistical design strategies on various medical research projects.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

RANDALL COMPTON
Statistician

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE

Randy Compton is an executive in Accenture's Analytics practice. He brings 10 years of experience in predictive analytics, statistical modeling, and econometric analysis

Randy served as the lead statistician for Accenture's Ireland Revenue Commissioner PAYE Fraud Detection Pilot.

- Data Analytics and Interpretation
- Statistical Analysis
- Econometric Analysis
- Forecasting

EDUCATION

- University of Michigan, B.A. (Economics) and M.A. (Applied Economics)

RELEVANT DIRECT EXPERIENCE

Accenture, LLP
Statistician

Lead statistician for fraud analytics application for national tax authority.

- Built analytical models to detect fraudulent tax filing and credits claimed, and integrated into operations and case management system
- Worked with clients to design and implement Enterprise Analytics offerings across business units
- Designed sales material and process maps for analytics solutions to augment existing products – forecasting for supply chain, cost benefit analysis, price elasticity, marketing solutions, customer segmentation, and demand forecasting
- Led client meetings to understand business objectives and design analytical solutions to solve business problem
- Conducted analyses to measure the financial impact of implementing analytics solutions for clients and outline the Operating model for effective implementation
- Lead for the market development initiative around Market Sensing and Competitive Intelligence to capture new sources of data for use in analytics models and reporting, filter meaningful information to clients, and measure the impact of changes across the economy and industry

Intercontinental Hotels Group
Led a team of analysts designing a business intelligence solution for global call center operations by consolidating data from multiple sources to support sales and operations performance.

- Managed the analysis of revenue delivery and expense budgets for 14 global reservations offices and support functions with over $180M in revenue and $70M in expenses.
- Built models to determine incremental activity from key words and other SEO initiatives, estimated impact of banner ads, and optimized landing page design using analytics
- Led a team of Process Design analysts on several projects to reduce costs and streamline work flows across the organization resulting in more collaborative work across departments, placement of phone numbers on consumer web sites, and customer specific messaging throughout the reservations and guest relations process
- Built revenue management models based on historical stay patterns and price elasticity
- Built time series forecasting models to predict call volume and key call statistics, such as handle time, speed of answer, and abandonment rate, down to the half hour interval by day for staffing and budgeting, and workforce management processes
- Created additional forecasting models to predict key operational statistics and revenue delivery

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

RANDALL COMPTON
Statistician

- Directed the statistical analysis of proposed initiatives, revenue delivery to hotels, performance of operations, and individual agent performance

Inflexion Corporation

- Worked with clients to understand their business needs, design specific analytical solutions, explain results of the models, and implement the results into their business
- Managed projects and worked with clients throughout the process from design to implementation of analytical and forecasting solutions, conducted analytical modeling
- Credit scorecard and Credit Scoring for Banking models for large multinational banking clients, survival analysis models for newspaper subscriber renewal pricing, Churn forecasting for telecommunications and transportation firms, forecast P&L line items and accounts receivable for national credit card company, call center staffing and call volume forecasts, including simulation models and workforce management inputs

United Parcel Service

- Built econometric models to estimate marginal cost of package pickup and delivery operations over time and across geographic regions for each product type.
- Investigated uses of marginal cost to maximize profits in pricing model.
- Estimated price elasticity models to determine the effects of annual price changes on expected demand, and to determine the optimal price points for key customer accounts.
- Performed econometric analysis for Long Range Strategic Analysis Group, and investigated how changes in volume impact delivery system and labor hours.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

ROB FRIESS
Senior Manager

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Rob is a Senior Manager with 14 years of experience within procurement operations and sourcing/category management. He has conducted procurement assessments, strategic sourcing activities, business process outsourcing, procurement merger assessments, and managed large teams at several clients. His areas of focus have been Government and Financial Services. Rob has led 4 of Accenture's largest procurement transformational programs. Additionally, he supports Accenture's High Performance Procurement Mastery research and workshops, and manages the Sourcing Analytic Center of Excellence.	• Procurement Opportunity Assessments • Strategic Sourcing, Spend Analysis, eSourcing • Procurement Transformation/Strategy • Source to Pay Business Process Design • Large Program Management • Industry Experience: • Public Sector Finance

EDUCATION
• University of Oregon, Bachelor of Science in Finance and Marketing

RELEVANT DIRECT EXPERIENCE

Commonwealth of Pennsylvania – Strategic Sourcing

Program Lead

Served as the overall program lead for two year procurement transformation engagement which saved the state over $140M annually. He was responsible for coordinating management activities across all project teams, including interfacing with the Deputy Secretary for Procurement and key State personnel.

State of Texas – Spend and Delegation Analysis and Opportunity Assessment

Project Lead

Served as the project lead for a spend analysis and opportunity assessment. The team also reviewed the existing legislation and recommending changes to better leverage buying power.

US Department of Health & Human Services – Procurement Assessment

Project Manager

Project manager for a strategic sourcing viability study to support a business case for leveraging cross-agency spend of consumable commodities. Work effort included assessing spend and evaluation of current purchasing practices to identify opportunities.

Two Financial Service Regional US Banking & Mortgage Institutions

Program Lead

Program Lead for 2 major bank transformational outsourcing programs. The program successfully met 10%+ annualized savings goals and transition to new technology and operating environment. Responsibilities included interfacing with business owners for program governance and running operations.

University of Texas at Austin

Led a strategic sourcing assessment of goods and services categories across all departments to identify cost savings opportunities. The assessment looked at contracting practices at the University level and utilization of "piggyback" contracts at the state level.

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State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

RODERICK HUGHES
Revenue BPM Specialist

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE

Rod has 12 years experience in the Revenue Industry driving all phases of analysis and system implementation including: Project Lifecycle Management, Team Building and Leadership, Requirements Gathering, Quality Process Improvement. He is a co-inventor of the patent pending High Performance Revenue Agency – a business architecture viewpoint of revenue agencies that enables comparisons across different revenue agencies for gap analysis.

- Financial Analysis and Business Case Preparation
- Metrics Management and Reporting
- Risk Identification and Mitigation
- Presentation Channels
- Business Architecture
- Enterprise Architecture;
- Revenue Agency Process Transformation
- Operating Model Design
- Process Design
- Project management
- Information Management
- Business Case Research and Preparation
- Portal Solution Design
- Analytics Based Process Design
- Metrics Management & Reporting

EDUCATION

- Purdue University, Bachelor of Science - Civil/Environmental Engineering

RELEVANT DIRECT EXPERIENCE

Accenture

Project Lead, September 2007 - Present

The High Performance Revenue Agency is a patent pending process catalogue and encyclopedia of innovative practices from around the globe. It is a representative business architecture of a high performing revenue agency. Led a team 6 revenue executives with extensive revenue experience from Dublin, Shanghai, Canberra, London, Indianapolis, and Singapore as they distilled the process expertise of our 1000 Revenue professionals and 60 revenue agency clients into a searchable format representing the leading operational delivery of each function of a revenue agency. The asset has been validated and improved by senior tax administrators at the IRS, Switzerland, Czech Republic, Thailand, Poland, Missouri, NYC, France, and Finland.

Relevance: Business Architecture, Business Process Re-engineering, Revenue Administration across geographies

United States Internal Revenue Service

Workshop Manager, January and July 2009

The High Performance Revenue Agency is used as the basis for a workshop that is offered to the Senior Executive Service Candidate Development Program for the IRS. Manages the workshop delivery and facilitates parts of the workshop. The workshop equipped the IRS executives with knowledge of leading practices employed in other countries, educates them on areas outside of their areas of expertise, develop ideas for enhancing their part of the IRS, and provides a context in which to compare IRS to other high performing revenue agencies. Conducted a strategy workshop for the Swiss Federal Tax Administration and prepared similar workshops in the last year for revenue agencies in the Czech Republic, Poland, and Mexico.

Relevance: Revenue Strategy, Revenue Administration Across Geographies, Operating Model Design

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

RODERICK HUGHES
Revenue BPM Specialist

Indiana Department of Revenue

Project lead for Web Applications, June 2005 – May 2005

Served as project manager for several releases of a business portal for the Indiana Department of Revenue from kickoff to project close. The Intax portal provides a full-featured virtual taxpayer service center including account inquiry, e-file and pay, secure message center, bulk file and pay options, client services for tax service providers, and online account management. Through three major phases, the Intax portal produced more than 300,000 filed returns, 450,000 submitted payments, and $2 billion dollars collected in its first 3 years of service. Facilitated and completed business case development for prioritization of IT projects as well as risk management plans and execution for the Information Technology Division.
Relevance: Presentation Channel, Working as a delivery manager in a complex State Revenue agency.

Pennsylvania Department of Revenue

Process Transformation Lead

Process Transformation Lead responsible for process design deliverables, identification of benefit opportunities for agency wide integrated tax system implementation

Mexico National Revenue Agency (SAT)

Subject Matter Expert, December 2009 - Present

Subject Matter Expert supporting Enterprise Architecture project for SAT examining and comparing existing operation against High Performance Revenue Agency for Operating Model, Business Architecture, and Process Designs

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State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

SHARLA CLOUTIER
Consultant

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE

Sharla is a Consultant in Accenture's Sourcing and Procurement Practice. Her focus areas are the Public Service and Financial Services industries where she has supported the delivery of a procurement outsourcing program and strategic sourcing savings.

She has 3 years of sourcing and procurement experience in various indirect categories including IT, banking equipment / services, and water treatment chemicals. Sharla has also managed program-level spend and savings tracking, P&L forecasting and conducted client training on the strategic sourcing process.

- Strategic Sourcing
- Supply Chain Management
- Program-Level Spend and Savings Tracking
- P&L Forecasting
- Industry Experience:
- Public Sector
- Finance

EDUCATION

- Princeton University, Bachelor of Science in Operations Research and Financial Engineering
- Certificate in Finance
- Certificate in Engineering and Management Systems

RELEVANT DIRECT EXPERIENCE

State of Florida – Strategic Sourcing
Led the sourcing of Water Treatment Chemicals (estimated statewide spend of more than $80 million) and supported the sourcing of Office and Educational Consumables. She also developed and maintained vendor sales by entity database for top statewide agreements. She utilized the database to determine top other eligible users of statewide agreements and opportunities to market specific agreements, as well as to show the value the client was providing to the State beyond state agencies

Financial Service Regional US Banking & Mortgage Institution – Strategic Sourcing

Supported multiple sourcing categories, including Banking Equipment, Banking Services, and IT. Banking-related initiatives included national ATM Cash Servicing, Banking Center Armored Courier, Debit Card Fraud Strategy, Conventional Banking Equipment, and Voice Recording. She helped lead a team of 12 Accenture and client resources to review and renegotiate maintenance agreements by establishing a repeatable centralized process for evaluating annual maintenance renewals. She drove over $2 million in annualized savings through the renegotiation of current contracts, reduction of unused software licenses, and realignment of service levels based on application criticality.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

SHENGJUN (SHEN) LIU
Statistician

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Shengjun Liu is a senior Statistician in the Health & Public Service Advanced Analytics practice. Shen brings more than 16 years of diverse analytic experience. He has a proven track record of developing and promoting best analytical solutions and practices. He excels at streamlining and standardizing analytical processes combined with quality and efficiency improvement	• Statistical Analysis and Modeling • Segmentation • Profiling • Forecasting • Optimization • Data Management • SAS Programming

EDUCATION

- PhD Candidate (Part time) in Statistics, Ohio State University, Columbus, OH, Mar. 2006 – Present
- Master of Science in Statistics, Ohio State University, Columbus, OH, Dec. 2002
- Bachelor of Engineering, Wuhan Industry College, Wuhan, China, Jul.1997

RELEVANT DIRECT EXPERIENCE

Accenture, LLP
Surface Visibility (USPS)
Senior Statistician, February 2011 – May 2011

- Lead the effort to gather, analyze and model client data (customers, financials, operational, organizational, access channel), key performance indicators, and/or market data (competitors, products, suppliers), using a broad set of analytical tools and techniques to develop quantitative and qualitative business insights and improve decision-making.• Assessing opportunities and making subsequent recommendations as to the analytical approach
- Modeling types may include linear/logistic regression, neural nets, decision trees, fractional factorials, etc.
- Developing, testing, implementing, and potentially maintaining statistical modeling implementations
- Interacting with clients of all levels to review expected outputs, applicability to business challenges, and model measurement
- Guiding the data formulation process which may include identification of attributes, exploratory data analysis, data transformation, and temporal layout

Canada Post Corporation Analytic Environment Assessment
Senior Statistician, February 2011 – March 2011

- Assessing opportunities and making subsequent recommendations as to the analytical approach
- Modeling types may include linear/logistic regression, neural nets, decision trees, fractional factorials, etc.
- Developing, testing, implementing, and potentially maintaining statistical modeling implementations
- Interacting with clients of all levels to review expected outputs, applicability to business challenges, and model measurement
- Guiding the data formulation process which may include identification of attributes, exploratory data analysis, data transformation, and temporal layout

GBS International Service Performance Peak Season Analysis (USPS)
Senior Statistician, September 2010 – December 2010

- Gather, analyze and model client data (customers, financials, operational, organizational, access channel), key performance indicators, and/or market data (competitors, products, suppliers), using a broad set of analytical tools and techniques to develop quantitative and qualitative business insights and improve decision-making;

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

SHENGJUN (SHEN) LIU
Statistician

- Assessing opportunities and making subsequent recommendations as to the analytical approach. Modeling types may include linear/logistic regression, neural nets, decision trees, fractional factorials, etc.
- Developing, testing, implementing, and potentially maintaining statistical modeling implementations.
- Interacting with clients of all levels to review expected outputs, applicability to business challenges, and model measurement.
- Guiding the data formulation process which may include identification of attributes, derived data creation, exploratory data analysis, data transformation, and temporal layout.
- Testing and adopting the new remote data and analytical environment
- Exploring best analytical options for internal and external non-technical audience
- Leading a team of data analysts and statisticians to deliver the final solution

Merkle, Inc.
Associate Director, Director of Analytics, March 2007 – September 2010

- Helped build and operate the offshore office, recruited, trained and managed about 20 offshore analysts to support the internal and external clients; The operation was a success and positively impacted the company's bottom line
- Play an analytical lead role for Merkle's new start up business in media targeting: LogicLab; Work with the technology and media planning and creative teams to develop the overall solution and deploy an analytical engine for a cutting edge media targeting platform; Worked on multiple print media targeting projects and developed VBA tools as interim solutions for our clients
- Led the content analytics and shared resources team to support the sales team help promoted the 'easy to buy and easy to sell' solutions framework and win multiple new clients within a year
- Helped develop a proprietary Dry List Testing processes (patent pending) which has become the new norm for vertical lists sourcing industry
- Managed ongoing analytical software evaluations, testing and new capabilities demo and explorations
- As part of an innovation team, help develop the digital, media-mix modeling and corporate segmentation capabilities; Help with digital data integration (DDI) and media data integration
- Leveraged social media data to help a major electronics manufacturer to monitor competitive intelligence and plan marketing content for upcoming product launches
- Managed marketing mix evaluation for a major pharmaceutical company. The analysis allowed estimating the incremental contribution of various promotions, advertising campaigns, new product launches and halo/cannibalization effects on the sales of a major drug brand
- Developed a corporate segmentation solution for a well known non-profit client to enable customized creative messaging and lifetime value based customer acquisition and retention efforts.
- Helped win another major auto insurance client. Developed app to mail models and value targeting roadmap to support both its broad market and affinity lists campaigns. Integrated the client's analytical resources as well as its analytical environment into Merkle
- As part of Merkle infrastructure task force team, helped migrate our data platform from Mainframe to Oracle, Helped transform our server based analytical environment to centralized Statistical Work Bench
- Helped win a major insurance provider by modeling competition. Client awarded 3.5 FTE retainer
- Built cloning and activation models for a leading telecom company and provided universe expansion and meta-model solutions. In market test showed at least 50% improvement over the current models.
- Build and manage internal model inventory. Lead the efforts to develop a series of new data products and industry specific generic models

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

SHENGJUN (SHEN) LIU
Statistician

- Improve typical modeling timeframe from 4 weeks to less than 1 week by promoting the modeling automation tool I developed. The tool has been widely used and is highly effective
- Develop the analytical engine and evaluation processes for Content Lab, Merkle's proprietary content sourcing and data optimization solution

Capital One

Senior Analytical Consultant, October 2006 – March 2007

- Worked full time as an onsite consultant at Capital One to promote best analytical practices and help on analytical initiatives
- Built and helped implement risk-controlled targeting models for Small Business Card unit. The models are successfully used in the production
- Helped develop the cutting edge incremental attrition models and business strategy to inform the APR adjustment decisions for defaulted cardholders
- Worked with compliance and operations department on proper documentations and smooth model implementation

Merkle Direct Marketing, Inc

Statistician (I II), Lead Statistician (I II), Senior Manager, Dec. 2002-Sep 2006

- Led the efforts to win the first DMA Analytical Challenge modeling competition
- Played analytical lead role on a major insurance account and proposed new analytical and BI projects.
- Helped win a multi-Million dollar account from a major insurance company. Streamlined the whole campaign process and made significant impact on client bottom line. Lead the team efforts on the 2nd generation of models and improve the response performance by 30%.
- Initiated and formulated modeling methodology and campaign strategy for a national leading lobby. Led a team to execute solutions that include dozens of participation models, multiple renewal models and survival models. The final LTV and marketing matrix solution were successfully implemented
- Developed media mix models for a top auto insurance provider to optimize ad spends across media channels. A media planning and performance forecasting tool is developed based on model results
- Proposed and led new projects to develop campaign models and innovative campaign strategy for a major internet service provider
- Supervised and mentored statisticians and played a consulting role on multiple modeling projects
- Developing 'Content Evaluator', an SAS based automated data-mining tool for building predictive models and evaluating data content
- Helped a major retailer's online department to conduct multivariate testing (fractional factorial experiment design) as well as A/B testing
- Developed, tested and implemented retention (attrition) models, claims models and survival models for a national insurance company. Marketing segmentation matrix was developed based on the loyalty and profitability analysis. Models and segmentation matrix were implemented in both client's in-house database and Merkle Knowledge Center
- Worked on multiple email reporting and targeting projects for a major PC manufacturer and retailer
- Helped a top auto insurance provider to track online traffic and conducted conversion funnel analysis
- Defined, compiled, and presented marketing campaign performance reports analyzing critical information including response rate, conversion rate, retention rate, and ROI
- Developed list recommendations according to analysis on customer profiling and campaign performance to drive acquisition and conversion strategy. Provide weekly, monthly and ad-hoc reports on business performance and marketing activities to senior management for strategy

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

SHENGJUN (SHEN) LIU
Statistician

adjustment and development

- Developed funding model, customer cloning model and risk model for national leading mortgage company for its sub-prime campaign; Developed multi-stage models for leading life insurance companies for their life and accidental/death insurance product
- Extracted data from client's KC database using SQL and conducted segmentation analysis for a national auto insurance company
- Developed and implemented response and conversion models for leading insurance company. Utilized linear and logistic regression and other statistical tools to build and validate models for acquisition campaigns. Models have been used to select over 20MM pieces of direct mail and perform successful
- Implemented and tested all types of models into Database; Conducted SAS and SQL conversion
- Built prospect and customer response models for a leading PC producer and cataloger using multi-source data and customer data; Developed time series forecasting tools to predict future key performance metrics

The Statistical Consulting Center, OSU

Statistical Consultant, Jan 2002 – Dec. 2002

Provided statistical consulting services for clients off campus, faculty and graduate students on campus; Helped with a variety of statistical analysis including manipulating data, developing statistical methodology, building predictive models and other models.

Department of Statistics, OSU
Teaching/Research Assistant, Sept. 2000-Dec. 2002

Acted as a Teaching Assistant for both undergraduate and graduate student statistics courses; acted as Research Assistant for several statistical research topics including missing value imputation methodology, longitudinal data analysis and survival analysis.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

SPENCER ROSBOROUGH
Manager

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Spencer is a Manager in Accenture's Supply Chain Sourcing & Procurement practice based out the Chicago office and joined Accenture in 2005. Spencer's areas of specialty are Strategic Sourcing, Procurement Transformation and Supply Chain Management Strategy having worked with a variety of clients to enhance their Supply Chain capabilities. His work has helped companies increase operating margins, improve asset utilization, reduce costs, mitigate risk and improve customer service. Spencer has a Bachelor's degree in Business Administration from the University of Illinois and has 11 years of relevant work experience.	• Strategic Sourcing • Procurement Strategy • Procurement Opportunity Assessment • Low Cost Country Sourcing • Supplier Relationship Management • Procurement Transformation • Category Strategy and Assessment • Industry Experience: • Public Sector • Resources • Communications & High Tech Finance

EDUCATION

- University of Illinois, Bachelor's degree in Business Administration

RELEVANT DIRECT EXPERIENCE

US Based Communications & High Tech Company – Strategic Sourcing

Team Lead

Team Lead for the Field Services category, responsible for managing a 13-person cross-functional Accenture and client team in six regions across the country. Team was responsible for creating and implementing standard operating procedures across the country and securing strategic contracts with vendors who could execute accordingly.

Malaysian Based Financial Services Company – Strategic Sourcing

Team Lead

Strategic Sourcing project as part of a large operational transformation initiative. Team Lead for Marketing and General Spend categories. Managed a client team of seven (7) people through strategic sourcing processes to achieve savings targets and gain notoriety with business users across the organization.

Global Financial Services Company – Procurement Process and Technology Assessment

Team Lead

Project to identify the operational gaps between North American and European Procurement Operations. Team Lead for North American team which lead the overall initiative to compile the data, determine the to-be Global Procurement Operational strategy, and develop the business case to support the defined strategy.

US Based Financial Services Company – Post Merger Integration

Spencer assessed the sourcing and procurement workforce for the merged organization and proposed a to-be workforce environment including organizational structure, headcount and level of experience within each role.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

VALERIE VAN LEUVEN
Manager

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Valerie is a member of the Supply Chain Management practice, specializing in sourcing and procurement as part of the Albany, NY office. Valerie has been with the firm for over 8 years, supporting and delivering sourcing and procurement transformation change projects in large organizations over the past 6 years. She has deep experience in strategic sourcing, category management and procurement transformation, having lead work streams in each of these areas. Valerie led several category teams during 18 months of the Pennsylvania project.	• Strategic Sourcing • eSourcing (eRFx, Reverse Auctions, etc.) • Supplier Relationship Management • Category Management • Contracts • Organization Re-Design • Strategic Sourcing & Category Management Training • Management Industry Experience: • Government Finance

EDUCATION
• Clarkson University, Bachelor of Science in Engineering and Management • Clarkson University, Masters in Business Administration

RELEVANT DIRECT EXPERIENCE

Regional Healthcare Insurance Provider – Procurement Optimization/Strategic Sourcing
Lead
Valerie served as the Procurement Optimization Lead, evaluating enterprise procurement operations, developing to-be state for enterprise procurement and interfacing directly with the Director of Procurement. She also led sourcing for the Building Rental and Lease category.

Financial Services Global Banking, Mortgage & Insurance Company – Strategic Sourcing & Category Management
Valerie developed a Customer Engagement Model, conducted assessments for Marketing and International Operations and led an opportunity identification assessment. She also, developed a robust training program for Category Management and delivered training to ~ 70 procurement professionals in 3 locations. Accenture was selected to assist in delivering $70M in procurement savings during 2008 and build a Category Management Program.

School District of Philadelphia – Procurement Assessment & Strategic Sourcing
Valerie was responsible for assessing 3 categories and leading the sourcing efforts on 2 categories in the public education arena that included a Procurement Diagnostic Assessment and delivery of Strategic Sourcing. The project resulted in savings in excess of $140 Million.

Commonwealth of Pennsylvania – Strategic Sourcing
Valerie was responsible for sourcing efforts on 2 categories and assisted on two additional categories in her spare time. The project and each category delivered savings in excess of the goal. Accenture was engaged in a gain-share contract to save $110 Million through the strategic sourcing of 22 commodities over two cycles.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

VIRGINIA BRISTOL
Data Analyst/SAS Programmer

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Virgina is a senior Data Analyst and SAS Programmer with strong problem-solving, analytical and investigative skills. She has 12 years experience using SAS for development, testing, validation and manipulation of large data sets on multiple platforms in several industries including telecommunications, pharmaceuticals and IT/professional consulting. Team player with the ability to multi-task, meet tight deadlines, and deliver a high-quality work product. Virginia was the lead Data Analyst on the NYC Department of Finance RPIE Tax Collection Fraud Pilot.	• Data Integration and Management • Statistical Analysis, Forecasting and Modeling • Business Intelligence • Analytical Reporting and OLAP Solutions • SAS Programming

EDUCATION

- Colorado Institute of Art. Certified Chef, 2000
- Boston University, Master in Public Health in Epi/Biostats, 1991
- Beloit College, Bachelor of Arts in Mathematics and Computer Science, 1987

RELEVANT DIRECT EXPERIENCE

Accenture, LLP

Customer Chemistry (subsidiary of Agilex Technologies, Inc.)

Senior Data Programmer/Analyst (telecommuting), July 2006 – July 09
TiVo, XM Radio, XO Communications, TracFone, Grande Communications, UTS, RCN

- Supported Customer Retention, Cross-Sell, Collections, Campaign Management/Measurement, and Survey Analysis activities
  – Results include improving Collections by 37% and reducing Churn by 19%
- Identify, review, and analyze data from large data repositories (most were TB+).
- Source data from Oracle, SAS, Excel, Flat files, and other RDBMS platforms.
- Perform data cleansing and ETL to migrate data into appropriate environment (e.g., Oracle, SAS, etc.) using SAS or PL/SQL.
- Create exploratory data analysis reports using PROC FREQ, PROC MEANS, PROC UNIVARIATE, etc.
- Create, validate and document large Analytic Data Marts (many TB+) for use in statistical modeling
- Design, implement and maintain monthly scoring processes for refreshing model scores and ongoing data refreshes.
- Enhance ETL and data cleansing code to minimize processing time, optimize maintainability, and support automation.
- Update code to accommodate changes to models and data sources.

Pacioli Companies

Senior Analyst – Consultant, August 2004 – September 2005
Wells Fargo Home Mortgage   June 2005 – September 2005

- Research old Roll Rate model (which predicts delinquency) and help create a validation of the model for auditors.
- Update design documentation to assist in explaining the Repurchase Exposure and Roll Rate models.
- Implement code improvement to improve the Repurchase Exposure model.

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State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

VIRGINIA BRISTOL
Data Analyst/SAS Programmer

Wells Fargo Home Mortgage   August 2004 – December 2004
- Extract and transform data from various Excel, Access and Oracle databases for use in creating models.
- Create and implement the programs necessary to run the Probability of Default (PD) and Repurchase Exposure models.

Yipes Communications, Inc.

Senior Business Analyst, December 2000 – September 2002
- Install and maintain the test and production SAS servers.
- Develop and automate various SAS reports from multiple Oracle databases to provide critical data to Sales, Marketing and Operations Management for customer and network activities. Reports focused on revenue, customer information, prospective customers and network activities.
- Post reports (100+) on the intranet in the form of graphs, listings, and drill-downs using SAS/IntrNet$^{®}$

TEK Systems – Denver, CO (on assignment with Yipes Communications, Inc.)

Senior Analyst, June 2000 – November 2000

- Load SAS datasets with data from external files (CI/Harte Hanks and D&B).
  Create mailings and telemarketing lists using various these data sources to target potential Yipes customers.

Trilogy Consulting, Inc

Statistical Programmer, December 1997 – May 2000

AT&T – Part Time   October 1999 – May 2000
- Establish weekly and monthly reports for the @home and video markets.
- Produce list pulls for @home.
- Query data and verify information using BRIO.
  TCI Communications   July 1999 – September 1999

- Maintain response analysis reports on a month-to-month basis.
- Create list pulls for telemarketing and mailings for the Marketing department.

US West Dex   April 1998 – June 1999
- Work in the financial applications area supporting GEAC software (Accounts Receivable, Project Tracking, and Fixed Assets).
- Support production systems on-call as well as enhancements and daily problem solving.
- Upgrade the Accounts Receivable system to the Y2K compliant version as well as all supporting reports (approximately 100 SAS programs) to meet Y2K compliance.
- Re-design the input of employee salary information into the Project Tracking system to better track the costs associated with various projects.
- Create other ad-hoc reporting, documentation and train new employees.

Cahners Publishing   December 1997 – March 1998
Generate direct mail and telemarketing lists by running conversions and merges/purges using Group 1 software. Use SAS to select subgroups of subscribers and load new subscribers into data files. Develop ad hoc reports, Excel files and mailing labels.

accenture

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

WILLIAM F. KASTNER
Statistician/Data Analyst

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE

Bill Kastner is a Management Scientist within the Health & Public Service Advanced Analytics practice. Bill bring more than 20 years experience creating custom stored procedures to automate data preparation and analytical processes. He has consulted with management teams regarding analytical methods and provided statistical programming support, design, model development, and implemented enterprise database systems for business applications and research investigations in a variety of public and private sector environments.

- Data Integration and Management
- Statistical Analysis, Forecasting and Modeling
- Business Intelligence
- Analytical Reporting and OLAP Solutions
- SAS Programming

EDUCATION

- MS Statistics, Colorado State University, 1987
- BS Forest Management, Colorado State University, 1983

RELEVANT DIRECT EXPERIENCE

Accenture, LLP
USPS Analytics
Senior Manager, July 2010 – June 2011
- Creating analytical datasets from large data sources (multi-Terabyte) through the development of highly-efficient reusable code structures
- Developing, testing, implementing, and potentially maintaining data transformation processes
- Interacting with clients of all levels to review data sources, data inconsistencies, business logic, etc.
- Implementing the data formulation process which may include identification of attributes, exploratory data analysis, data transformation, and temporal layout. This process will include guidance and input from other analytical resources
- Validation of data from capture through transformation
- Results - Identified churn segments that make-up ~80% of USPS multi-billion dollar customer revenue loss over the last 6 months

Teksystems Inc.
Senior Statistical Consultant, November 2009 – July 2010

- Principle Client involved in Distribution Supply Chain Management
- Develop forecasting process to forecast distributor orders using SAS Forecast Server
- Develop SAS stored processes to modify data, generate reports, and process data for export to Teradata
- Integration of custom user interfaces with SAS stored processes
- Collaborate with a team of 4 SAS developers to define end-to-end forecast process
- SAS system administrator
- Articulated and Documented Functional and Technical Specifications
- Serve as liaison between IT department, SAS developers, and End User

Customer Chemistry, a Division of Agilex – Home office

Senior Statistician, January 2006 – October 2009

- Supported clients in the Federal Government, Communications and Direct Marketing industries
- Implemented an OLAP solution in Oracle and SAS that provided data for reporting, statistical analysis, and forecasting at a leading prepaid wireless provider using Base SAS, SAS Forecast

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

WILLIAM F. KASTNER
Statistician/Data Analyst

Studio/Server and SAS High Performance Forecasting

- Utilize Forecast Studio client application to implement forecasting solutions based on 40,000 series.
- Automated Reporting systems, Ad hoc Reporting and analysis, OLAP, Data ETL, Quality Assurance, Statistical Analysis/Programming, Database development using SAS and Oracle software
- Designed, developed, and validated a Quality Assurance process of statistical modeling data in support of Tier I communications provider using Base SAS, SAS Stat to access data stored in Oracle, Teradata, and SQL Server
- Developed a SAS process using Enterprise Guide that provides ETL from SQL Server and POSTGRE, and integrated the data into a reporting solution for use by senior management and business analysts. Implemented the solution using SAS stored procedures and Unix scripting.
- Supported IT staff on the design of an OLAP solution for a Fortune 50 corporation
- Researched and documented a process to standardize incoming data from outside marketing agencies
- Led a feasibility study for SAS EBI at a leading post-paid communications provider
- Designed and developed business intelligence data marts to support transaction level tracking and monitoring systems for several Fortune 500 corporations
- Designed and implemented data integration methods for accessing disparate data sources using SAS
- Provide data intelligence for "Clean Room" activities in support of gaining regulatory approval for a large corporate merger
- Participated in post-merger integration (ETL & Data Quality) of existing transaction capture and monitoring systems with an emphasis on supporting Business Intelligence and Statistical Modeling
- Managed and provided guidance to teams of various sizes
- Supported the design and development of a business intelligence data mart and define future reporting needs for a large government entity using SAS Data Integration, SAS Enterprise Guide

High Plains Analytics

Consultant, January 2003 – January 2006

- Defined and developed tine sensitive data mart system in support of management reporting
- Evaluated SAS product suite for inclusion in operational processes, including SAS ETL Studio, SAS Web Report Studio, SAS/IntRnet, and SAS/QC
- Automated data cube updates and data quality reporting using SAS stored procedures
- Interacted with IT staff to integrate SAS capabilities into data integration operations, specifically in the areas of data quality management and project cube/data mart updates
- Designed business intelligence data mart which integrated multiple large disparate data sources (structured and unstructured)
- Facilitated team approach to data design by coordinating across disciplines and functional organizations
- Provided statistical insight and analytical support to clients
- Developed data management logic in support of corporate initiatives

Professional Search and Placement

Consultant, August 2000 – December 2000

- SAS program development for clients in Insurance (specifically re-insurance) industry
- Developed algorithms for matching transaction data from multiple sources with demographic data
- Designed and demonstrated concepts for automated data aggregation system
- Provided SAS support for in-house programmers
- Documented automated system design and procedures

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

WILLIAM F. KASTNER
Statistician/Data Analyst

Abacus Direct, a division of DoubleClick, Inc.

Senior Statistician, November 1999 – July 2000

- Developed buyer behavior models applied to catalog transactions
- Primary statistical contact for Abacus' largest client
- Provided guidance/planning support to junior statisticians
- SAS programming support in effort to automate existing modeling systems
- Investigated feasibility of combining several modeling methodologies into one system for use by Statistics Department
- Provided internal SAS support
- Assisted in evaluation of SAS Enterprise Miner, specifically test plan development and multi-platform testing

Sysix Technologies

Senior Analyst /Statistician, September 1998 – November 1999

- Consulting statistician specializing in clinical trial and clinical device recall data management and analysis
- Provided principle communication link between database administrators and statisticians. This reduced redundant effort designing and accessing data from database systems
- SAS site software representative
- Supported 10 SAS programmers and associated initiatives for multiple clients.
- Represented statistical group in documentation standards efforts underway at Sysix

Analysts International Corporation

Software Developer, December 1997 – September 1998

- Participated in a team of software developers rewriting existing network reporting applications
- Designed and developed software interfaces that link Oracle databases to SAS, C++, and web- based user applications
- Investigated and implemented techniques to increase efficiency and accuracy of data extraction from Oracle using Oracle SQL and SAS SQL Pass Through facility
- Lead effort to document Signaling System 7 (SS7) network reporting software design
- Assisted software development team leader in efforts to formalize software review process

National Jewish Medical and Research Center

Statistical System Analyst, January 1989 - December 1997

- Designed, developed, and implemented clinical trial database management systems
- Consulted with clinical staff in the use of computerized systems for collection, storage and analysis of biological, financial and clinical data
- Developed and documented techniques to use multiple operating systems (UNIX, MACOS, VMS, Windows) for distributed database applications in a research environment
- Developed clinical trial database programming using SAS, FileMaker Pro, Visual Basic and Microsoft SQL Server software
- Lead technical development of the two largest clinical trial database management systems at National Jewish using SAS (Base and AF) as primary toolset
- SAS site software consultant
- Designed, assembled and maintained campus-wide research computer network integrating DEC and Sun minicomputers and workstations, Apple Macintosh and Intel-based personal computers

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State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

WILLIAM F. KASTNER
Statistician/Data Analyst

- Established statistical quality control techniques and provided data analyses

Rockwell International, Aerospace Operations
Advanced Statistical Analyst, July 1987 - January 1989

- Implemented statistical techniques for environmental and process control problems
- Experimental design, computer analysis and reporting of results using SAS Software
- SAS site software consultant
- Maintained mainframe and microcomputer interface used by Statistical Applications group
- Department of Energy "Q" clearance

Microcomputer Services - College of Forestry and Natural Resources, Colorado State University
Manager/Instructor, October 1985 - July 1987

- Supervised staff of 15 designing, implementing and maintaining the first microcomputer teaching facility and microcomputer network system on campus
- Assessed current and future impacts of microcomputers on natural resource management. Reported results to college faculty and advisory committee
- Established teaching and research standards for microcomputers. Several departments reported increased efficiency and cost savings due to implementation of standards
- Developed and instructed graduate and undergraduate courses in microcomputer usage. Upper level class became required for graduate students in the Electrical Engineering department

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

XAVIER FERRAGUT
Analytic Delivery Lead

QUALIFICATIONS AND SUBJECT MATTER EXPERIENCE	
Xavier is a results driven professional and strategic thinker with more than 13 years experience driving bottom line results through innovation, operational excellence and use of customer/market intelligence in consumer goods, manufacturing, telecommunications and financial industries.	- Strategic Planning - Change Management - Systems Integration - Customer Retention & Revenue Management - Supply Chain & Manufacturing Management

EDUCATION

- CFA (Certified Financial Analyst): Passed Level I, June 2008
- Florida International University, Master of Science in Finance, August 2007
- McGill University, Masters of Business Administration – International Business Strategy, June 2001
- Monterrey Institute of technology (ITESM), Bachelors of Arts in Industrial and Systems Engineering, May 1996

RELEVANT DIRECT EXPERIENCE

Accenture, LLP
Analytic Delivery Lead, 2010 – Present
USPS Enterprise Analytics
Analytics Delivery Lead, November 2010 – May 2011

- In charge of developing the project pipeline and providing strategic direction on delivery of advanced analytics solutions.
- Have proposed and solutions for Operations performance, Worfkforce Benefits management, Sick Leave analytics and Suspicions mail inspections.
- Lead delivery of over five Advanced Analytics PoC projects at USPS in the areas of CRM, Service Measurement, Scan Compliance and Retail analysis.
- Consult with clients to define program needs, design solution, recommend proper analytical methodologies, initiate and execute projects.
- Manage and provide strategic direction to a team of 5 – 10 resources responsible for designing, developing, implementing, and maintaining predictive statistical models using statistical modeling and data mining techniques.
- Provide direction on the creation of performance metrics and tracking processes to measure the effectiveness of the predictive modeling efforts.

Canada Post Corporation Analytic Environment Assessment
Delivery Lead, February 2011 – March 2011

- Lead delivery team for an Advances Analytics Maturity Assessment evaluating Canada Posts efforts to implement a center of excellence for advanced analytics.

TRACFONE Wireless, Inc.
Director of Retention Analytics and Strategy, 2007 – 2010

- Assembled and manage the Retention Intelligence and Strategy team (predictive analytics, data mining and market research), implemented procedures and lead creation of technology to support development of churn reduction and revenue strategies for four brands with a customer base of over 15 million subscribers.
- Lead Direct Marketing operations function in charge of deploying over 74 million communications

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

XAVIER FERRAGUT
Analytic Delivery Lead

per month over email, text, voice and direct mail channels. Oversee development and implementation of supporting infrastructure and communication channel vendor relations.

- Efforts have contributed to an estimate 145 million in incremental subscriber value from a 5% reduction in churn, 4% increase in revenue as measured against a universal control group.

Senior Manager Warranty Services, 2005 – 2006

- Orchestrated turnaround of company's Warranty Exchange program.
- Operation handled more than 20,000 warranty exchange cases per week.
- Generated supply chain savings in excess of 3 million dollars per year from relocation of distribution center, outsourcing contract negotiations, implementing remote controls and full integration of CRM and Logistics ERP modules.
- Increased service levels to over 98% of orders being processed on time and in full while reducing customer complaints by more than 90%.

Manager Process Improvement, 2004 – 2005
- Managed team of analysts focused on development of surprise free prepaid wireless service. Typical initiatives related to new service development, new handset development, increasing of automation success rates and improving customer service applications and operation.
- Spearheaded company-wide ISO 9001-2000 initiative.

London Consulting Group
Sr. Operations and Strategy Consultant, 2001 – 2004

Completed assignments for fortune 500 companies in the areas of Manufacturing, Supply Chain Management, Marketing and Sales, Systems Integration and Post Merger Integration.

Owens Illinois-Zanzibar (Glass container manufacturer)

- Post merger change management and process integration during ERP migration from SAP to Great Plains at the Puerto Rico plant and corporate offices in Dominican Republic.
- Operational excellence manufacturing project leading to savings of $900,000 per year from doubling productivity and negotiating supplier contracts.

Kimberly Clark (Fortune 500 Global Consumer Goods Company)
Manufacturing, Logistics & Supply Chain management

- Post merger integration for two distribution centers and an acquired plant in Puerto Rico.
- Generated over US$1,000,000 in cost savings; increased record of "On Time And In Full" orders from 65% to 95%; 90% reduction of sourcing stock-outs; Elimination of obsolete product and excess inventory; 15% increase in warehouse productivity.

Trade Marketing & Sales

- Post merger integration and reengineering of commercial and trade marketing processes; advanced sales training and full integration of sales and merchandizing teams with logistics operations. Resulting in 50% stock-out reduction in retail shelves; $7,000,000 increase in annual revenue.
- Conducted management leadership training programs to develop a continuous improvement and teamwork environment.

Banco Hipotecario (Consumer and Mortgage Bank)

- Lead consultant for retail banking branch operations project.
- Designed and implemented cross selling strategy for bank's financial products.
- Developed workload analysis and balancing tool based on key work load drivers.

State of Minnesota Department of Administration
Enterprise Data Analytics Program (EDAP)
Response to Request for Proposal
June 27, 2011

XAVIER FERRAGUT
Analytic Delivery Lead

Hildebrando S.A. de C.V.
Business Process Engineer, 1997 – 1999

- Reported to the CEO and worked across organization implementing operational improvements.
- Reduced payroll cycle by over 80% by integrating electronic banking and reengineering information input processes.
- Implemented internal controls and audits to assure the quality of ERP system's information for more than 400 consultants.
- Established human resource policy to reduce the number of idle consultants and turnover.

DREAMSOFT, Inc.
Electronic Marketing Manager for Internet Startup, 1996 – 1997
- Created and promoted www.dreamup.com reaching over 150 hits per day within months.
- Enabled low cost e-commerce sales and billing capabilities.
- Managed public relations obtaining publication of various reviews of company products.

L&X THE PRINTSHOP
Partner & General Manager, 1991–1999
- Founded and managed printing operation that supplied small and medium sized businesses with customized printed promotional and office supplies. Sold business in 1999.