

DANIEL MONROE

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CLIENT SERVICE LEADER

Talented, visionary leader with dynamic career and proven track record of increasing program quality, expanding services, and improving systems. Achieved strong and sustainable results through communication efforts with business and technical leaders, assessing learning goals, and adapting to ever-changing customer and market needs.

Superior negotiation, communication, collaborative, and cross-functional skills. Use expertise in leadership, facilitation, and project and relationship management to effectively deliver learning and performance solutions that improve existing business processes and carve way for new opportunities for future business.

Core professional competencies include:

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|---|---------------------------------|------------------------|
| ❖ Adult Learning Theories & Techniques | ❖ Relationship Building | ❖ Project Management |
| ❖ Instructional Design Theory & Methods | ❖ Group Facilitation & Dynamics | ❖ Vendor Relationships |
| ❖ Financial & Cost Accounting Integration | ❖ Learning Management Systems | ❖ Change Management |
| ❖ Conference Design & Management | ❖ Workshop Presentations | ❖ Business Analysis |

SIGNIFICANT PROFESSIONAL HIGHLIGHTS

- ♦ **Led initiatives resulting in quantifiable success and achievement of business objectives.** Devised innovative systems and processes that improved performance indicators and were linked to strategy.
- ♦ **Negotiated contracts resulting in significant benefits to companies** *without sacrificing relationships and creating a win-win situation* for all parties involved.
- ♦ **Saved hundreds of thousands of dollars for employers** by initiating and leading numerous impactful, high-quality training courses. Recognized productive training opportunities while improving retention rate and protecting firm from liability.

CAREER SYNOPSIS & KEY ACHIEVEMENTS

MASON SIMMONS, LLP ✧ Seattle, WA

2003 – Present

Manager of Learning/Global Public Sector ✧ 2006 – Present

Due to high performance, promoted to manage and improve internal compliance and performance management standards, knowledge fairs, continuing professional education (CPE) programs, and vendor relationships. Oversee 2 direct reports; 1 Instructional Designer and 1 Training Coordinator.

Key Achievements:

- ♦ **Designed highly effective Sexual Harassment Awareness Training course for department** and *due to success, requested to use across the entire firm.* Collaborated with corporate legal department and employee relations to redesign course based on target audience. In addition, worked closely with HR department to use situations relevant to participants.
- ♦ **Increased overall training topics and attendance at knowledge fairs.** Managed 4 knowledge fairs, averaging 250 attendees per conference with over 10 breakout sessions. Designed and self-authored web site content, writing communiqués, designed, tested, and deployed registration system, coordinated vendor exhibits, etc.
- ♦ **Improved effectiveness of onboarding program for campus hires** by including 2-day skills boot camp, self-study program, and offering social events to help them assimilate to an accounting firm, government clients, and professional life.
- ♦ **Produced first-ever \$1M budget for training** based on ASTD benchmarks, historical spending patterns, and planned training events.
- ♦ **Implemented process improvements** for CPE requirement's tracking and enforcement. Designed CPE "Quick Guide" describing how to earn CPEs, and achieved 100% compliance with self-serve online CPE submissions in less than 2 months.
- ♦ **Reduced non-compliant professional staff with continuing education requirements from 25% to 8%** in 2 months in 2006. *Continued to achieve 100% compliance* with all staff for 2006 and 2007.
- ♦ **Saved company up to \$15K by negotiating contract** for PMP prep course with Velociteach, including instructor travel and materials for up to 25 attendees.
- ♦ **Created new benchmark, managing 50 training events** from Aug 2007 – Mar 2008.

Senior Manager/Global Public Sector ✧ 2003 – 2006

Recognized for leadership, quickly promoted from Manager to Senior Manager. Oversaw client projects averaging \$2M in annual revenue, overseeing all aspects of project teams including forecasting, chargeability, mentoring, coaching, and evaluation of project staff. Performance Manager for 5 employees while overseeing 8 people on Engagement Team.

Key Achievements:

- ♦ **Implemented 3 multimillion-dollar, large-scale cost accounting systems supporting 871+ offices, 13,500 employees, and \$40B in annual budgets.** Software implemented included SAS ABM, Hyperion Business Modeling, and Metify ABM. *Provided innovative delivery channels for client training, and online training and webinars.*
- ♦ **Created a change management strategy for implementing cost management system solution** for agencies up to 10,000 employees. Turned original, standard survey into user-friendly, strategic, results-oriented tool. Used various strategies including pulling from operational and administrative offices to gain different perspectives as well as uncovering issues from last implementation to make solution as thorough and impactful as possible.
- ♦ **Decreased cost and tightened timeframe for clients** by creating blended facilitation (asynchronous online for brainstorming followed by in-person conference to come to consensus) to develop activity dictionary for cost accounting systems. Gained understanding of target audience and made sure process fit their personality types.
 - *Highlight: Developed process for Civil Engineers which allowed them to come to consensus in less than 2 days on 180 activities.*
- ♦ **Saved significant cost and time for client by meeting the specific cost accounting implementation needs**, i.e. Fish and Wildlife client project, comprised of 10,000 users. Worked with Perseus to design and implement online survey tools based on accessibility and streamline their spreadsheets to one user-friendly tool.

LEWIS & CLARK CONSULTING ✧ Portland, OR

2002 – 2003

Project Management Specialist ✧ 2002 – 2003**Key Achievement:**

- ♦ **Facilitated 2-day conference for agencies under Department of Homeland Security** to come to consensus on naming schema for Department's email naming convention. Prepped 25 representatives from agencies and system integrators by providing them with options and examples from which to work. *Due to efforts, group quickly came to consensus and completed ahead of schedule.*

NORTHWEST CONSULTING, LLP ✧ Portland, OR

1997 - 2002

Manager ✧ 2000 – 2002

Directed staffs of consultants supporting project engagements for the U.S. Coast Guard. Oversaw \$1M in annual revenue. Managed net revenue, captured qualified business leads, assisted with business development, conducted sales presentations, and led proposals. Due to performance, quickly promoted 3 times over a 3-year period.

Key Achievements:

- ♦ **Developed cost evaluation system for three-vendor, outsourcing proposals valued at \$40B** in operating/capital budgets over 40-year tenure.
- ♦ **Decreased non-value added time to zero and increased data integrity** by improving technology in client process. Deployed 250 offices for resource and activity drivers. **Identified gaps, recommended process changes, and developed best practices** with the Oracle Financials implementation. Facilitated 20+ sessions with subject matter experts to develop solutions.

Senior Consultant ✧ 1999 – 2000**Consultant** ✧ 1998 – 1999**Senior Management Analyst** ✧ 1997 – 1998**PERFORMANCE CORPORATION** ✧ Portland, OR

1996 – 1997

Associate Financial Analyst ✧ 1996 – 1997**Key Achievements:**

- ♦ **Reconciled multimillion-dollar discrepancies** between the sub ledgers (Fixed Assets, Accounts Payable, and Project Accounting) and general ledger. *Implemented best practice that became the new procedure.*

Performance Corporation continued...

- ♦ **Used motivational methods and training techniques** to provide training for colleagues to improve Oracle GL system upgrade usage. This included information on how to book journal entries, save reports, and run ad hoc reports.

Earlier Career Experience includes:

A-ONE RESOURCES ✧ **Merchant Bank Relationship Manager** (1995 – 1996) ✧ **Financial Analyst** (1994 – 1995)

EDUCATION ~ CERTIFICATIONS ~ MEMBERSHIPS

BS in Accounting ✧ University of California – Los Angeles ✧ 1994

BS in Hotel, Restaurant, and Institutional Management ✧ University of Washington – Seattle ✧ 1992

Courses in Art of Human Communication, Theories & Techniques of Psychology, and Advanced Psychology
University of Washington – Seattle ✧ 2006

Seven Habits of Highly Effective Managers and Presentation Advantage ✧ Franklin Covey ✧ Seattle, WA ✧ 2005

Oregon Certified Public Accountant (CPA) ✧ Since 2000, *still active*

Computer Skills include:

MS Office, including Visio and Project; Centra; ReadyAccess with Global Knowledge; EyeCron; LearnLive; SumTotal; Facilitate.com; Webexone; Perseus; SurveyMonkey.com; TurningPoint; Mimio

PUBLICATIONS ~ PRESENTATIONS

- ♦ **Published:** Daniel Monroe and Martha Smith, “Web-Based Meeting Tools Can Dramatically Improve Idea Exchange,” *The Professional Digest* ✧ 2002
- ♦ **Presenter:** Institute of Management Accountant’s Annual Conference & Exposition, co-facilitated with Roderick Jones: Performance-Based Budgeting/Personal Coaching Styles Inventory; *audience of Accountants* ✧ Chicago, IL ✧ 2005
- ♦ **Presenter:** Idea Forum at SAS Institute’s Better Management Live Conference, co-developed performance-based budgeting demo with SAS Institute integrating 3 SAS products: strategic performance management (SPM), financial management (FM), and activity-based management (ABM); *audience primarily government agencies* ✧ Phoenix, AZ ✧ 2007

MEMBERSHIPS ~ CERTIFICATIONS ~ LICENSES

American Society for Training & Development (ASTD), Member ✧ 2007 – Present

Certifications include:

ASTD, E-Learning Instructional Design Certificate Program ✧ Seattle, WA ✧ 2008

Triaxia Partners, Personal DISCernment® Inventory Certification Workshop ✧ San Francisco, CA ✧ 2007

License includes:

Corporate Coach U, The Coaching Clinic Licensed Facilitator ✧ London, England ✧ 2003

Scheduled to take PMP exam July 2008 and PHR exam by December 2008.