



Sample...  
Candidate Presentation



Position: Director of Revenue Accounting

Candidate Name:	Scott	Tom	Rachel	
<b>Candidate Overview</b>	Scott is a CPA, CMA and has his Masters in Accountancy from San Jose State University. He has close to 7 years Big 4 experience starting out with E&Y on the tax side and then spending 5+ years with PwC in San Jose and Taiwan on the audit side. While in San Jose from 1998-2002, Scott was the In Charge Senior on the Borland account for 2 plus years where he focused a great deal on revenue recognition in a software environment. Scott is a very well rounded professional with a balance of technical accounting and finance skills as well as systems and process implementations. His passion is to migrate his career more towards "accounting" than finance thus a strong fit for this role. One of our partners and I met Scott in person and both graded him a A+. He is clearly smart and has a very thoughtful and calm demeanor about him. He was very easy to talk to and has a very balanced perspective of life. He is just beginning his career search after the RIF at Northrup and suggests that the Company and opportunity are more important than the title and salary for his next role. After hearing about and doing his own research about Aurora, Scott agrees this could be an excellent opportunity.	Tom is an experienced senior finance leader with a strong technical background. Most recently, he was a Director in the PwC Software Sector Advisory practice working on significant projects for large public companies including Sun and BEA. Tom has a very strong academic background including a CPA, MBA, and certificate in advanced accounting from Santa Clara University with a 4.0 GPA. He started his career on the East Coast and moved West in 2001 and worked for a few public companies before joining PwC in early 2005. Tom has hands on experience across the "value chain" of Order fulfillment from working with companies and clients to define sales and marketing strategies to understanding and then recording and reporting the financial results. He has taught revenue recognition boot camps and authored a Global revenue recognition policy for a \$14B hardware and software company. After being one of a group of senior leaders to be "RIF'd" from PwC, Tom is contracting while looking for his next opportunity with sensitivity towards stability on his resume. He is a results oriented leader with depth and breadth in his experience.	Rachel was referred to our firm in 2007 and has subsequently referred some excellent candidates our way. She is clearly an A player by association. My partner, Marilyn has met Rachel in person and found her to be extremely professional and talented. I interviewed Rachel over the phone, and was impressed. She is an MBA and not a CPA. I decided to present Rachel to give you an option to hire a strong professional who has a lower salary expectation and gave me confidence she would be successful in the role. Rachel describes it best in her resume profile: "An entire career in finance, streamlining processes, organizing new systems and developing effective talent." Offers entrepreneurial enthusiasm within a corporate framework. Rachel has years of experience in private software companies, currently at Oracle where she owns revenue recognition. Her recent and relevant experience at Cisco where she was a revenue assurance consultant for 2 years highlights her recent exposure to applying technical guidance in a services and software organization. The CFO who hired Rachel in Feb 2008 has left Cisco. Rachel likes her work, but is eager to explore opportunities to be part of something special.	
<b>Candidate Experience:</b>	<p>The ideal candidate has maturity in their finance leadership skills and recent revenue recognition experience, preferably in a software environment</p> <p>This person needs to have confidence in their ability to design and implement processes and infrastructure to support a mature revenue accounting and close process.</p> <p>Culturally, the position requires a collaborative, results oriented professional who can work cross functionally and manage a team to successful outcomes.</p>	<p>No question on professional maturity with this candidate! Scott has only had one industry job with Northrup for over 4 years. His first role as the Sales &amp; Marketing Controller allowed him to provide decision support for the commercial side of the business and included updating the rev rec documentation and working closely with the outside auditors to satisfy compliance. In addition to having a close hand in compliance at Northrup, Scott had sizable software clients in his audit experience (see above) and was involved in a IPO attempt including the S-1 filing. His technical experience is relevant.</p> <p>Scott was the recipient of the Finance Achievement Award in Q1 '08 for his role in the successful implementation of a restructured SAP system to support the new international legal structure. Most recently, he has been the finance team member responsible for SAP training. He and I talked at length about the tool, which modules were already implemented at Aurora and what best practices for implementing the revenue or "sales and distribution" module would look like. He talked specifically about what you get "out of the box" and what most people do to handle Multiple element arrangements for deferred accounting. He gets it.</p> <p>One of Scott's references, the VP of Tax at Northrup (now at Boeing) said, " Scott had to work with peers and VP of Sales types, who typically don't like finance. He was respected as a leader and made things happen. He seems soft spoken, but can be firm when needed and flexible when needed." The roles Scott has had in his years of experience - public accounting, Sales &amp; Marketing finance and Project management require someone who understands how to work collaboratively to be successful.</p>	<p>YES, Tom has been the acting Director of Revenue Accounting at Cisco for the past 5 months. Clearly the client base that Tom worked with in his role at PwC were relevant to hardware / software technology companies. In addition, he worked as the Director of Internal Audit for a public software company and as the Director of the SW Sector Advisory Practice at PwC taught revenue recognition courses. He published a whitepaper on Software R&amp;D Value management and authored 6 leading practices in 97-2 VSOE management. Moreover, he is well like and respected by teams and peers and has managed teams on many occasions.</p> <p>Tom is the type to quickly root cause a problem and accurately assess the "Should Be" environment and then quickly set out to achieve results. We have talked on several occasions in detail regarding his current assignment at Cisco, and it is clear to me that he can roll up his sleeves and get involved in mining data, assessing process gaps, and proposing solutions to simplify and automate solutions. In his accounting manager role at Hitachi, he led the close for revenue, sales commissions, standard costing and reserves. He knows what a clean close looks like.</p> <p>YES, Tom gets it. He is not just a back end accounting guy. He is keenly aware of the impact front end decisions in sales and marketing have on the revenue process, and demonstrates the ability to collaborate and influence cross functional momentum towards excellence in this area. He communicates well down, across and up. He likes to work with a talented team and develop them, he gets right in there himself and walks the walk, and he can teach, train and communicate strategy proposals to management as well as interface with the auditors effectively.</p>	<p>Rachel was educated and trained in Europe and has worked in management roles in the US since 2000. She has managed teams of up to 10 people and works in a very collaborative style. The program manager at Cisco who provided a great and credible reference said, "she had the ability to get along with difficult personalities on the team and make things happen". In her current role, Rachel is reviewing contracts &amp; providing guidance under SOP 97-2 in particular to ensure GAAP compliance for the healthcare software company. Her Cisco experience is also clearly relevant.</p> <p>This is Rachel's strength. She implemented two ERP systems including J.D. Edwards. She has not worked with SAP, but is confident her knowledge and process orientation can be applied to any tool. She is working on the close process at her current company which was taking long over a month prior to her joining and is now reduced to 20 days with further improvements coming.</p> <p>Greg at Cisco indicated the team of folks involved in the multi year revenue assurance project recognized Rachel as a calm, friendly, get it done leader who he likened to someone with good work ethic, but more like the good Goddess Maria in the Sound of Music. He said, she was one of the nicest, soft spoken people, but scrappy enough to make sure it got done. People really liked working with her and we often gave her the contracts to review that no one else could handle. She even reviewed contracts in Spanish and German for them! Her phone demeanor demonstrated that she was thorough and calm in approach.</p>
<b>Education / Certificates:</b>	<p>Aurora needs someone who knows what the end product needs to be and gets things done.</p>	<p>Scott and I talked about the requirements at Aurora and he clearly knows what is required to be ready for an IPO and build processes for "operational excellence".</p>	<p>Tom has the technical depth and leadership breadth you are looking for.</p>	<p>She gets it, AND knows how to do it.</p>
<b>Education / Certificates:</b>	<p>BS/BA degree</p> <p>CPA</p>	<p>BS - Economics &amp; Political Science UC Riverside (1995) ; Masters in Accountancy SJSU (1996)</p> <p>Yes, California CPA and CMA</p>	<p>BS Economics ; BAS Engineering Wharton - University of Pennsylvania 1990 ; MBA University of Michigan 2001</p> <p>Certificate of Advanced Acctg 4.0 GPA - University of Santa Clara 2004.</p> <p>Yes, California; License current</p>	<p>Controller Accredited DEGREE ; Master of Technical Management ; MBA - Golden Gate University 2001</p> <p>No</p>
<b>Current Salary:</b>	\$150K base	\$153 base plus \$20K bonus	\$190K base	