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| **Chief Financial Officer (CFO) –** Using Metrics to Fuel Growth | |
| 1. During a 3 year period of over 1,500% growth; implemented new accounting system and integrated 7 acquisitions, implemented new benefits program considered by staff to be far superior to previous coverage while cutting cost by over $150K; exceed all bank covenants, Venture Capital reporting requirements and streamlined internal reporting, reducing time to report by 66% while adding project reporting and regional based reporting with no interruption of service. 2. Implemented continuous process improvement to drive efficiency and profitability resulting in a 98% reduction in unbilled revenue, while reducing client write off by 65%   Manage strategic and tactical operations of the following areas:  Finance & Accounting | Administration | Legal | Human Resources | IT |Risk Management | Treasury | |
| **Certifications** | |
|  | Certified Public Accountant (CPA) Certified Management Accountant (CMA) Top Secret Clearance (Deactivated 2006) |
| **Professional experience** | |
| **2009 – 2012 CLEAResult Consulting**  **Chief Financial Officer Austin, Texas**  A $100 million, professional services firm providing consulting services to utility clients to design, implement and evaluate cost-effective energy efficiency programs.  *Responsible for all aspects of finance and administration including Finance, Accounting, IT, Human Resources, Legal, and Administration.*   1. **Finalist in Austin Business Journal 2010 CFO of the Year.** 2. **Reduced month end close process** – Improved close process from 15 business days to 5 business days. 3. **Created Financial Operations Review Meeting** – A joint meeting of Finance and Regional Leaders to review and discuss the monthly result and forecast the current quarter, related cost savings of over 50k annually. 4. **Implemented Microsoft Dynamics SL (Solomon)** – at cost of less than 1/3 of the budget, regional, project and sector profit and loss statements accounting reports were generated in less than 60 days from start of implementation. Future enhancements allowed for dynamic self-serve Program Manager, Director and Sector reporting and drill thru to line item detail as needed, all while maintaining the required security levels. 5. **Negotiated a new banking relationship** – A line of credit was put in place that was over 3x larger than the previous relationship, net annual interest savings over $50k due to treasury management and favorable terms. 6. **Implemented new Health Benefits package** – Reduced cost by over $150K per year while improving services. 7. **Built team** – Grew team from 2 people at Corporate Offices to over 20 people in 10 locations. 8. **Led Audit Team** – Completed the first audit and continued to work with the audit firm to streamline the process to ensure timely audit reports.   **2006 – 2008 Customer Operation Performance Center Inc.**  **Chief Financial Officer /Chief Administrative Officer Austin, Texas**  A $15 million, professional services firm with 25 professionals providing consulting services with offices in 4 countries and affiliates in an additional 3 countries.  *Responsible for all aspects of administration including IT, Human Resources, Marketing, Logistics, Administration and Finance, both domestically and globally.*   1. **Finalist in Austin Business Journal 2008 CFO of the Year.** 2. **Implemented Microsoft Dynamics SL (Solomon)** – In less than a month the first line of business P&L & project accounting reports were generated – this was the first time the firm was able to determine the profitability of each project at cost, and the profitability of lines of business including operating expenses. After careful analysis of this and other factors the operating structure was reconfigured to better serve the profitable sectors of the client base. 3. **Streamlined the Contract Process** – By using technology, new procedures, and training staff, we were able to implement a process that tracks each project from proposal to completion and ensured every project was reviewed quarterly at a minimum, and invoices were generated within one week of a milestone being completed. In the process over $200k of unbilled revenue was identified. 4. **Streamlined Collections** – Past due was reduced to less than 5% of A/R, the lowest level ever. 5. **Developed the first accounting & finance policy manual** –Successfully trained accounting staff in new accounting system and new policies. 6. **Reduced month end close** **by 10 days** – Increased the documentation and compliance checking while reducing time to completed 7. **Developed & implemented a new cash management program** –Anticipated annual savings over $75K.   **2000 – 2006 Palladium Group, formerly Balanced Scorecard Collaborative**  **Corporate Controller Lincoln, Massachusetts**  A venture capital backed $80 million, professional services firm with offices in 5 countries and affiliates in an additional 10 countries, launched in 2005 from the merger of three companies, including Balanced Scorecard Collaborative.  *Responsible for all aspects of the global accounting and finance function, included month end close, cash management and forecasting, executive reporting, key metric, scorecard updates, setting and administering accounting polices and procedures, coordinating annual audit, and annual tax return preparation. Responsible for preparing quarterly employee financial brief, board analysis and executive committee monthly financial review.*   1. **Promoted to become the company’s first corporate controller** – The promotion was based on impact and results as Balanced Scorecard’s Controller. 2. **Championed and drove the financial systems integration** – Merged 3 entities and 2 subsequent acquisitions. Led the redesign of the accounting system, and the implementation of new time and expense system. Designed the systems to effectively balance the complex needs of the 3 existing entities while transitioning to accommodate the new organizational structure of 6 profit centers, over 20 departments and 11 cost centers as well as to accommodate future acquisitions and significant organic growth plans. Transition was completed in less than 6 months. 3. **Led the team responsible for the redesign and implementation of accounting policies and procedures** – These included time & expense, A/P, invoicing & collections, revenue recognition, project reporting and month end close. Reduced the revenue to cash cycle by 26 days resulting in annualized savings of $400k. 4. **Primary relationship manager for banking and lending issues.** 5. **Managed and led a team** – Total of 10 people including 5 direct reports. | |
| **Controller Balanced Scorecard Collaborative, merged into Palladium Group Lincoln, Massachusetts**   1. **Member of the Consulting services senior leadership team** – Advisor to senior management on financial and business matters, including improved the financial management and growth strategy of the business unit. 2. **Reduced the unbilled** – Reduced 98% while reducing the revenue to cash cycle by 110 days in less than one year. 3. **Developed and implemented a finance project review process** – This process effectively resolved client issues promptly and thereby reduced client write-off from 5% to 1.75%. 4. **Created and launched a set of “client-focused” financial reports** – These reports and the reporting system were tailored to more effectively support the decision-making needs of a highly engaged CEO. 5. **Primary relationship manager for banking and lending issues**. 6. **Lead month end close cycle revisions** – These were designed to provide management with maximum reporting while ensuring compliance with GAAP. The program cut external audit fieldwork by 50% and reduced audit cost by over 30%. 7. **Initiated and directed a taskforce that integrated the CRM** – The CRM became a fully viable product that was adopted by all lines of business and became a key management tool for over five years. | |
| **Education** | |
| **Master of Business Administration** - Chaminade University  **Bachelor of Science in Accounting** - Alfred University | |