

SUMMARY

- CIMA Qualified Accountant with 15 Years Plus experience of VBA
- Specialises in Saving Clients Time and Money by using Macros and Advanced Formulae to Automate Reporting and Manipulate Data using a combination of Excel, Access, Word, SharePoint and Outlook.
- Prepares full specifications (both technical and functional), user documentation and UAT scripts.
- Undertakes Webinars and Seminars
- E-Book Author
- Centrally based (Kettering) with easy access to London via train
- Broad Experience base (Banks and Financial Institutions, Retailers, Manufacturers, Wholesalers, Not for Profit, Charities, Central Government etc.)

1. SKILLS

- Excel (15 years), Access (15 years), VBA (12 years), Word (15 years), Outlook (3 years)
- Automatic report generation and data manipulation
- Computerised Systems and Reporting Development
- Webinars and Seminars
- E-Book Author
- Financial, Management and Systems Accountancy
- Business Objects (working knowledge)

2. EDUCATION/QUALIFICATIONS/LOCATION

- ACMA (All at Grade "A" in finals). B.A. Business Studies
- Based in Kettering (within 1 hour of City and West End, Eastern Birmingham. Within 40 mins of Peterborough, Cambridge, Bedford, Luton, Milton Keynes, Coventry, Rugby, Leicester, Northants)

3. EMPLOYMENT (Last 5 years)

Writing Book Nov 2015 – Current (Author)

- Wrote book about current financial crisis.
- Published March 2016.

CITIBANK Oct 2015 – Nov 2015 (VBA Macro Analyst Developer)

- Client required a number of Word Reports to be created from data held in Excel.
- Duties involved transferring the data held in Excel to specific places in the Template Word documents to allow speedier production of reports.
- Accomplished this by using Bookmarks to position the data correctly and using VBA to "tweak" the reports to ensure no blank pages occurred.
- Documented the above.

JJE Capital Feb 2015 – Aug 2015 (VBA Troubleshooter. Working from Home)

- Client required 'Trouble Shooter' to be available 24/7 for large project in the North of England.
- Duties involved solving technical Excel problems and producing reports at short notice to enable the project to be managed effectively.
- Upgraded a number of standard reports in addition.

DHL Sep 2014 – Jan 2015 (VBA Macro Analyst Developer)

- Client required automation of a number of manual Excel processes to collate journal entries and upload them to Oracle. Specification included need to control and track number of entries and value.

- Completed automation with VBA Macros, using a large number of forms to provide users with choices of different journal types, wrote procedures and installed.
- Enhanced above system following UAT and provided documentation including a very detailed set of system notes to enable more enhancements to be made once the system is embedded.
- Saved the client time and enabled more control to be exercised than had previously been the case.

Greene King Jan 2014 – Sep 2014 (VBA Macro Analyst Developer)

- Client required enhancement to VBA Macros on a range of applications in the Business Analyst department.
- Completed enhancements with VBA Macros, wrote procedures and installed.
- Enhancements included automation of incoming emails to strip them of and process attachments within a defined time period and distribute reports automatically via email personalizing them using a list of recipients.
- Wrote user and technical documentation.
- Saved client time for producing reports allowing more attention to be paid to their primary functions (Business Analysis)

Ralph Lauren Oct 2013 – Nov 2013 (VBA Macro Analyst Developer)

- Client required enhancement to VBA Macro Development in Switzerland because of template changes on Download which caused dramatic increases in file size.
- Completed enhancements with VBA Macros, decreased file size and increased speed of code.

A La Carte Recruitment Aug 2013 – October 2013 (VBA Macro Analyst Developer)

- Client requires Graph based system to determine staff requirements on a client by client basis for future planning.
- Built system in Excel enabling client to ask ‘What If’ questions with advanced use of Formulae.
- Built VBA Macro driven application to enable allocation of pensions to customers. This resulted in considerable time saving as the process was reduced from 1.5 man days to 7 minutes.

Ralph Lauren (Switzerland) Jul 2013 to Aug 2013 (VBA Macro Analyst Developer)

- Client required upgrading of various Excel VBA Macro coded workbooks.
- Increased both speed and accuracy of input using VBA and SQL Queries.

Ralph Lauren May 2013 (VBA Macro Analyst Developer)

- Client required automation of onboarding HR form from Excel 2010 to AS400 with Macros and VBA.
- Met with client staff to discuss needs and expectations. Documented requirements and produced functional specifications to allow the building of the products needed.
- Built system using VBA and SQL and tested prior to implementation.
- Increased both speed and accuracy of input.

CBRE Global Investors Mar 2013 to Apr 2013 (VBA Macro Analyst Developer)

- Client required automation of billing from a manual system to MS Access 2010 using Macros and VBA.
- Met with client staff to discuss needs and expectations. Documented requirements and produced functional specifications to allow the building of the products needed.
- Built using VBA and SQL and tested system prior to implementation. Additionally documented system.
- Completed application increased accuracy and decreased time spent on producing the bills.

State Street May 2012 to Jan 2013 (VBA Macro Analyst Developer)

- Working in a dedicated team created for a large client transition involving OEIC, Life and Pension and Segregated Client funds. Develop spreadsheet and database solutions, including significant use of VBA to create robust automated processes
- Client required automation of a number of processes to allow integration of 600 client accounts into the business across a number of separate departments and functions.

- Met with client staff to discuss needs and expectations. Documented requirements and produced functional specifications to allow the building of the products needed.
- Additionally provided advice and specifications to enhance and rationalize existing reporting involving Microsoft products, mainly the interaction of Excel 2010 as a front and Access 2010 as a back end using SQL as a communications device.
- Migrated Access and Excel 2003 applications to 2010

Burberrys Jan 2012 to Mar 2012 (VBA Macro Analyst Developer)

- Client required automation of a Regional Worldwide Pay Review System based on Excel 2010 with a download from SAP to be run on a VBA and SQL based application supplemented by Formulas and Pivot Tables.
- Met with client staff in HR and planned new system based around an Access 2010 database which was used to control the output of spreadsheets to the reviewers and returning completed spreadsheets for a number of different review levels (starting with Manager level and extending up to CEO level for the final cut).
- Built, tested and implemented system adding numerical controls forms so it was possible to tell where any particular employee was in the process at any given point in time.
- Wrote technical and user documentation.

Citi Bank Sep 2010 to Sep 2011 (VBA Macro Analyst Developer)

- Client required a number of Excel and Access 2003 applications migrated to 2007 and manual systems to be automated, using VBA in combination with Formulas some with direct input via SharePoint and some with input via Excel 2010 and input from DataWarehouse.
- Built back ends combining both Access 2010 and Excel 2010 to import the data and produce the results required. In addition built interface to allow control and approval of data and produced emails automatically which varied in content depending upon the results obtained, using both Outlook and HTML in combination. Some output sent to Business Objects.
- Streamlined report output via Outlook using reporting and email templates.
- Largest report contained over 600 graphs which was produced from start to finish in less than 20 minutes.
- Presented 'Lunch and Learn' three times. This is a fortnightly departmental web seminar where a member of staff gives a one hour presentation over the intranet to members of staff during their lunch hour. Attracted the two best audience figures (239 and 183) for 'Automating Excel' and 'Excel's Built in Functions'. Participants view the presenters screen and are able, via conferencing facilities, to ask questions afterwards.

Alphabetical List of Clients: (January 1995 to Present)

Finance and Business Analyst and Developer for a variety of companies and organisations. Length of contracts varied between one month and three years.

Company/Organisation	Company/Organisation
Abacus Consulting (Employment Agency)	JJE Capital (Consultants)
Amazon.co.uk (Online Retailer)	London Probation (Central Government)
ABN Amro (Bank)	Medical Defence Union (Professional Body)
Belmay (Manufacturer)	Microgen Energy (Manufacturer)
Booker Cash and Carry (Wholesaler)	Moodys (Credit Agency)
BP Retail (Retailer)	Nationwide (Building Society)
Burberrys (Retailer)	Paragon Automotive (Reseller)
BZW (Bank)	Ralph Lauren (Retailer)
Cambridge Manufacturing (Manufacturer)	Schroders (Bank)
CBRE Global Investors	State Street (Bank)
Citibank (Bank)	Stena Sealink (Shipping Line)
DHL (Distributor)	Stroke Association (Charity)
Dorling Kindersley (Retailer)	The Car Shop (Retailer/Reseller)
Glaxo (Manufacturer)	TJ Maxx (Retailer, TK Max Holding Company)
Greene King (Brewers)	Transco (Utility Company)
HBOS Financial Services (Bank)	Unipart Technology (Distributor)