

EDWARD POTTER

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MANAGEMENT PROFILE

Business Intelligence management professional with a track record of significantly enhancing company operations. Define requirements aligned with strategic plans developed by senior management. Initiate partner relationships with IT staff to deliver critical decision-making information.

Key Strengths & Expertise

- Corporate strategic and tactical planning
- Project management to reduce risk
- Continuous process improvement
- Cross-functional team leadership
- Relational and OLAP database modeling
- Revenue-driven information management
- Focus on cost-effective problem solving
- Effective change agent and communicator
- Delivery of automated, accessible customer solutions
- Hands-on experience with Essbase, VBA and Excel

PROFESSIONAL EXPERIENCE

Capsule Magic, Inc. / CapsuleMagic.com, Inc., Arcadia, CA / Santa Clara, CA 2005–2007

Director, Online Development & Corporate Planning (Capsule Magic, Inc.)

- Requested by senior management to remain with the newly combined company during the transition period to execute a comprehensive knowledge transfer, which included communicating the relationships between web traffic, site transactions, direct and indirect revenues, and the expenses required to drive revenues.
- Designed and built multiple Essbase models, including a dealer-profitability model that provided margin visibility and analytical capability to Marketing, Sales and Finance at the supplier and customer levels across several consumer and fulfillment brands.
- Interacted with IT and business managers to achieve data definitions suited to their needs and to create the necessary data sets.

Director, Online Development & Corporate Planning (CapsuleMagic.com)

- Managed the Finance and Business Intelligence team, which included a Financial Systems Manager, a Business Analyst and a Website Analyst.
- Formed a cross-functional metrics team that worked with senior management to define operational reporting requirements and centralize tactical decision-making. Enabled transformation of a pro forma financial loss of approximately \$1.0 million per month into a break-even situation by re-architecting the forecasting process for greater visibility and access to product-line managers.
- Delivered support to Marketing and Product Management for measuring and analyzing the success of new Web site features / products and online-marketing campaigns.
- Directed the development of tools to optimize partner / affiliate relationships from the standpoint of both cost and performance.
- Initiated a company-wide report inventory that identified over 500 existing reports. Communicated with business managers and IT staff to select critical reports for retention and thereby reduce the resource commitment needed to support the reporting function.
- Contributed significantly to preparing the company for sale to Capsule Magic. Key actions included:
 - Modeled performance of major portal relationships to support the CFO and CEO in successful contract renegotiations.
 - Prepared due diligence materials, including driver-based models, to assist synergy modeling and analysis of historical expenses and revenues.
 - Designed and built an Essbase model to enable senior management to analyze and restructure the combined company prior to closing the sale.

Manager, Business Intelligence (CapsuleMagic.com)

- Interacted with the senior management team to clarify business objectives and develop corporate restructuring scenarios. Created and implemented strategies to transition the company from a dealer-referral model to one focused on the larger information-services market.
- Planned, directed and implemented significant Essbase-related actions, including the following:
 - With an outside consultant, developed a Hyperion Essbase model to provide actionable financial and transaction information, as well as accurate forecasting ability.
 - Managed a consultant and a staff programmer, who developed front-end templates for entering data in and generating reports from Essbase.
- Developed the information architecture required for the IT staff to provide high-quality data for financial and Web site performance analysis.
- Teamed with the Director of Online Development to design a Web-traffic and transaction-analysis model that provided decision support for partner deal analysis and negotiation.
- Recruited by the company to investigate and resolve a number of problems. Key actions included partnering with the Controller to improve operating efficiency as well as board and SEC reporting.
- Promoted to a position as Director of Online Development and Corporate Planning.

Petroni Winery, Tracy, CA

2000–2005

Associate Financial Systems Analyst, Corporate

- Streamlined consolidation of domestic and corporate financials by re-engineering the International Finance reporting system. Prepared consolidated monthly reports and performed monthly closings.
- Contributed to successful migration of International to an Essbase system. Researched and identified opportunities to streamline and automate data flow in a mixed NT and UNIX environment.
- Created aids for management reporting and profitability analysis by developing Essbase front-ends using Excel and VBA. Trained key analysts in the front-end development process.

Associate Financial Analyst, International

- Analyzed and revamped the group's forecasting for Y2K and other potential problems, which involved dealing with information from subsidiary operations in 78 countries.
- Developed automation tools and leveraged corporate data systems (Data Warehouse / Data Marts) to eliminate manual data-entry, reduce errors and shorten the financial closing cycle.

Business Analyst

- Provided critical support to the cross-functional team that redesigned the company's domestic distribution network. Reduced the network design time of analysts and reduced annual costs more than \$1.0 million by developing a database-driven, distribution-network-modeling application. Started with a pilot program in Louisiana, followed by nationwide rollout.
- Reduced tax overpayments and potential penalty exposure by designing and building a system to reconcile tax payments made by third-party warehouse operators. Trained Compliance staff in usage.

EDUCATION, PROFESSIONAL DEVELOPMENT & AFFILIATIONS

- **M.B.A. in Finance**—one year completed, California State University-Hayward, Hayward, CA, 2003
- **B.A. in Political Science**, California State University-Hayward, Hayward, CA, 2000
- **A.A. in Political Science**, Mission College, Santa Clara, CA, 1998
- **Essbase Bootcamp**, FP&A Train, San Mateo, CA, June 2002: OLAP technology and Essbase application development
- **Visual Basic Programming**, Certificate of Merit, Tracy, CA, September 2001
- **Institute of Management Accountants (IMA)**, member since 2003