

CONSULTANT PROFILE

Olaf Patzner

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Key areas ● Controlling and IT solutions

Special feature: I combine expert knowledge and many years of experience in controlling with solid, comprehensive knowledge of IT. Areas that have a great influence on the internal efficiency of a company and in which many threads converge. Unfortunately, however, often also areas in companies that are foreign to each other

● Processes & Organization

Entrepreneurial action and decision-making is getting more and more complex. How fast and target-oriented action is taken depends essentially on the processes and structures within the company. In addition to strong analytical skills, as a generalist I also have a sense for the big picture - especially in terms of interfaces and interactions between the individual areas as well as factors that unintentionally slow down dynamics and rob the energy in a company

● Interim Management

Bridging vacancies, e.g. in production controlling, temporary project management or support in the above-mentioned areas as well as in internal process optimizations. Access, Excel and VBA trainings, especially for non-IT staff, e.g. based on specific financial tasks

Professional experience

- For 35 years I have been managing and supporting projects in the areas of Controlling and IT, but also in finance and accounting as well as sales and HR. Wherever necessary, I acquire special knowledge in order to go into depth. Wherever possible, I look outside the box to avoid isolated solutions
- I have already gained management experience in line and project functions during my employment
- As an engineer and controlling graduate as well as a long-time employee in controlling and IT, I combine commercial and technical thinking

Industry experience

- International manufacturing industry (chemicals, textiles, pharmaceuticals, toolmaking, medical equipment, automotive), services (IT, finance shared service)

Customer benefit

- Added value through bundling of controlling and IT know-how / Know-why
- Low project risk due to extensive experience with change processes
- Practical, transparent solutions adapted to the individual situation



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- Consulting approach**
- Learning from each other and shaping with each other
 - Resource- and solution-oriented - pragmatist with strong hands-on mentality
 - The sustainability of the results of my work is very important to me, as well as the effort to quickly make myself superfluous as an external supporter
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- Availability**
- usually available at short notice on a daily basis, larger projects by arrangement
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- Regional focus**
- I prefer projects in Northern Germany
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- Foreign languages**
- German (mother tongue), very good written and spoken English
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- Year of birth**
- 1963
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- Nationality**
- German
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- Professional background**
- Independent management consultant for more 24 years



- Previously 10 ½ years with Johnson & Johnson (Dow-Jones listed company)
 - 2 ½ years **Head of Plant Controlling** (former plant of Penaten GmbH)
 - 1 year **Head of Internal Audit** and **Project Manager Corporate Planning**
 - 1 ½ years **Operations Controller** (planning, calculation, reporting)
 - 2 ½ years **Organization Programmer AS/400** (Finance and Sales)
 - 2 ½ years **IT Project Engineer** (decentral IT and PDA project management)
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- Education**
- 1997 Graduation as controller (RWK)
 - 1990 Graduation as electrical engineer (FH)
 - 1983 Completed apprenticeship as information electronics technician
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- Technologies**
- **ERP Systems:** SAP R/3 and S/4 HANA, JD Edwards, BPCS, PRISM, Ratioplan, etc.
 - **Applications:** MS Office Prof., Open Office, BPC, Apptio, Delta ALEA, TM/1 etc.
 - **Programming:** VBA (Access, Excel), SAP Query, AS/400 Query etc.
 - **OS:** MS Windows (95 – 10), DOS, IBM AS/400, VAX-VMS
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**Project (rather) in
Controlling**

Public Real Estate Management Company

06/2023 – 12/2023

Interim Management as Senior Controller

- A vacancy in the corporate planning department needs to be filled in the short term. The company is about to enter the very labor-intensive phases of forecasting as well as annual and medium-term planning
- I am responsible for preparing all the relevant files for six real estate companies, carrying out and coordinating the process steps through to processing and reporting to the shareholders
- At the same time, I ensure a thorough analysis and optimization of the tools (various “grown” Excel solutions), ensure improved data exchange between Excel and SAP HANA and create comprehensive documentation, among other things with the aim of being able to train the successor efficiently and sustainably
- During the last few weeks of my job, I am training my colleagues in the improved use of Excel as well as the easy usage of macros

**Project (rather) in
IT area**

International technology group

01/2022 – 04/2023

Data migration to SAP S/4 HANA

- All entities within the group worldwide are to be migrated from a wide variety of ERP systems to a new SAP S/4 HANA system. At the same time corporate processes will also be harmonized worldwide
- Within the data migration team, I am responsible for the areas of Material Master (MM), Production Planning (PP) and Quality Management (QM). Here I support the conceptual preparatory work, explain to the departments the necessity as well as the SAP background of the data to be migrated, assist in the cleansing and preparation of the source data obtained from the legacy systems and ensure the data quality
- The team is international, all my work is done remotely and in English language only

**Project (rather) in
Controlling**

World market leader in toolmaking

04/2018 – 12/2018

Interim Management in Controlling and SAP project support

- An organizational restructuring (matrix) as well as a recent change of the ERP system are burdening the company. Now the company has also been sold and again a new ERP system change within 12 months is pending – now from JDE to SAP
- I relieve both the head of controlling and the three-person team (production, sales and financial controllers) of their day-to-day work. I also support the SAP implementation project convert various Excel tools and reports for the new system
- I design and maintain a liquidity plan for the closure of an affiliated company and prepare the valuation for another affiliated company - including tax aspects



**Project (rather) in
Controlling**

World market leader in the textile industry

09/2016 – 02/2017 + 8/2017 – 4/2018

Interim Management in Plant Controlling

- The company has undergone massive restructurings. Plant controlling has been vacant for a long time. In addition to financial statements and investment calculations, the main focus is on the analysis and optimization of many processes in the plant
- First, the budget must be prepared. Then the product calculations - which have not been substantially adjusted for years - have to be examined. An internal, second year-end inventory must also be organized and managed at short notice
- Starting in February, the focus is on familiarizing the new plant controller and completing or handing over ongoing projects and operational tasks
- Later on, the client asked me again to bridge another vacant position in Controlling, but now for another location

**Project (rather) in
IT area**

International IT Management Consultant Company

07/2015 – 04/2016 + 07/2016

Introduction of Apptio and TBM for IT service provider

- Background: Technology Business Management (TBM) is an integrated end-to-end view of all IT resources of a company that are involved in the value creation process. Transparency of IT costs creates the basis for systematic optimization. The US company Apptio, pioneer and trailblazer for TBM, is today the leading provider of cloud-based automation solutions in this area
- In an international team I introduce the Apptio module Cost Transparency to an IT service provider with several thousand employees
- My tasks range from data collection and preparation via modelling and configuration of the system up to documentation and process description for the future TBM Office

**Project (rather) in
Controlling**

International financial, IT and HR service provider

02/2014 – 03/2015

Interim activity in product management

- Responsible for commercial control and internal cost and service allocation of externally purchased products of the group-wide IT infrastructure (LAN, WAN, Conferencing and Collaboration Tools)
- Ensuring day-to-day business and smooth transactions, ongoing development of management models and tools, and active support in change and optimization projects
- Responsible for budget planning and balance analyses
- Support in the expansion of a central database solution (cross-departmental) and development of a prototype for a new cost accounting methodology
- Create a variety of analyses and reporting features and support the team with automation tools



**Project (rather) in
Controlling**

Leading international tool industry

07/2012 – 01/2013

Interim Management in production controlling

- Perception of all activities of the sole, suddenly failed plant controller, reconstruction of tasks from mail correspondence, system access, conversations with other areas and a large number of Excel files
- Autonomous familiarization with the systems Baan and Professional Planner, active support of the planning process and cooperation in the upcoming change of the ERP system (Baan VI → Infor ERP LN)
- Contact for management and production management in all controlling-relevant issues
- Ensuring day-to-day business, financial statements, all analyses and reports required by management, and the provision of all data necessary for other areas

**Project (rather) in
Processes
& Organization**

World market leader in cosmetics and care products

04/2008 – 01/2013 (intermittently)

Sarbanes-Oxley Act (SOX) - Segregation of Duties (SoD) | concept development, automation and implementation of company-wide processes

- Structuring the centrally developed and continuously rolled out SAP control systems (e.g. reports) in the group and implementing them in a resource-saving and effective local organization
- Development of Excel tools for extensive automation
- Intensive communication with the participants of all departments about SoD relevant topics, the SAP authorization concept as well as process-related questions
- As the control systems are often not yet fully developed: Recognition of necessary corrections and communication of these to the Group

**Project (rather) in
IT area**

International IT service provider

06/2011 – 03/2012 + 06/2013 + 11/2016

Coordination, conception and development of a project calculation tool

- Analysis of Excel solutions that have grown over many years and are no longer usable as well as coordination of all requirements and processes of controlling and international project managers, e.g. through numerous telephone conferences
- Creation of several prototypes as well as a final "intelligent" project calculation and application form (Excel / VBA), which, despite extensive programming, runs reliably on hundreds of different PCs across Europe
- Special features: Detection of many project planning weaknesses already during data input by the project manager as well as automatic aggregation and transfer of data to SAP PS at the push of a button
- Several weeks of support during the introductory phase through numerous interactive video conferences in German and English language



Project (rather) in Processes & Organization	Market leader in medical products 04/2007 – 08/2010 Weak point analysis in shared service for external accounting, coordination between financial department and global IT service center for error correction <ul style="list-style-type: none"> ● Recognizing and analyzing sudden problems in the shared service for financial accounting after a customer's system migration ● Classification according to organizational, financial and technical causes including their description and communication (English) ● Monitoring of JD Edwards Xe / WebMethods / JD Edwards 7.3 interfaces ● Ensuring the correct transfer / booking of data in JD Edwards ● Preparation of solution proposals, their communication in an international environment as well as monitoring and tracking of the actual problem solution
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Project (rather) in Controlling	International textile fiber industry 05/2008 – 06/2009 Calculation methodology in SAP Weak point analysis and coaching (controlling) <ul style="list-style-type: none"> ● Background: after the introduction of SAP, inconsistencies are noticed in the calculation methodology, decision-relevant data are increasingly questioned - both by management and by controlling itself ● Creation of an 8-point step-by-step plan for a cost-effective, accompanying implementation ● Support for controlling as analyst, sparring partner and idea provider, identification of conceptual and systematic weaknesses in controlling ● Vulnerability Analysis in SAP MM and CO (Product Costing) ● Activity in daily blocks, each beginning with status recording and ending with new work packages for controlling and IT as well as a status report to the management
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Project (rather) in IT area	Market-leading pharmaceutical company 07/2005 – 12/2008 (intermittently) Analysis tool with reporting for field sales representatives <ul style="list-style-type: none"> ● Analysis of the existing instruments, which have grown over many years and are now error-prone and time-consuming ● Development of a customized database solution (Access) with automated interfaces to SAP (import mass data) and Excel (reporting, automatic mail dispatch) ● Expansion stage for sales Expansion stage for additional use in controlling Integration of a new company after acquisition ● Development of a planning instrument (Access/Excel) as a docking module, which leads to a reduction of the planning effort from weeks to a few hours with a significant increase in flexibility (simulation possibilities) and reliability <p>Note: the system was still in use in 2014</p>
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**Project (rather) in
Controlling**

International automotive supplier

08/2002 – 05/2007 (intermittently)

Cross-divisional cause and weak point analysis due to sustained and unexplainable negative business development

- Intensive study of business documents, interviews with various departments, analysis of existing processes (cross-departmental) and existing instruments (e.g. very deep detailed analyses in SAP MM, CO and FI), discussion of weak points and concept development for a solution

Interim Management in Operations Controlling

- Reorganization of controlling, employee development, creation of a new position, which centrally manages controlling for several plants and perception of this position as interim manager up to filling the position

Optimization of the planning process and restructuring of product costing and standard cost accounting in SAP

- Accompanying activity / support in analysis and optimization

Company cockpit with several expansion stages

- Conception and creation of a company cockpit for controlling and production (Access/Excel) | Expansion stage Process analysis for production | Integration of further production sites | Expansion stage Personnel time analysis | Sales cockpit (conceptual)

**Project (rather) in
IT area**

Leading international tool industry

03/2003 – 09/2004 (intermittently)

Analysis tool for contribution margin accounting as price/mix/quantity analysis

- Development of an individual analysis method for the company
- Development of a combination of database (Access) and Excel to replace existing tools that are no longer able to cope with the volume of data
- Automated import of mass data from Baan and export of analysis results in all conceivable densifications to Excel

Supplementing the database solution with efficient master data monitoring

Note: the system was still in use in 2013

Personal note

- In over 24 years as an independent management consultant I have managed and accompanied far more than 60 projects. Some were completed after a few days, others I accompanied for several years. With the projects described here in excerpts I would like to illustrate only the range of my activity
- I release brakes and create transparency. I develop instruments, structures and processes which fits into the organization and are lived by the employees in a sustainable way. Solid professional competence, pronounced analytical and conceptual skills, persuasiveness and a wealth of experience provide the foundation for this
- I only take on projects that I am convinced I can successfully implement. Depending on the requirements, I sometimes act as a specialist and sometimes as a generalist. I never view my tasks in isolation. And what is very important for me: as an external person I always try to make myself redundant again as soon as possible



	Expert	Advanced	
Controlling / Finance	• Production and plant controlling	○	
	• Product and project calculation	○	
	• flexible standard cost calc. planned cost calc.	○	
	• Controlling concepts Controlling instruments / tools	○	
	• Planning reporting deviation analyses	○	
	• Support for US-GAAP financial statements		○
	• SOX (Sarbanes-Oxley Act) SoD (Segregation of Duties)		○
	• Training on-the-job (production controlling)		○
		○	
IT	• Design of controlling relevant IT systems	○	
	• Development of Excel and Access tools	○	
	• VBA programming	○	
	• Conception and optimization of interfaces	○	
	• Collection/extraction, analysis, evaluation of (mass) data	○	
	• Data exchange (ERP system – PC)		○
	• SAP Query AS/400 Query		○
	• Training-on-the-job (VBA, Excel, Access)		○
Processes / Organization	• Analytics (workflows, processes, structures, interfaces)	○	
	• Automation (workflows, processes)	○	
	• Process optimization Creation of transparency	○	
	• Accompaniment of change processes Reorganization	○	
	• Documentation (workflows, processes, interfaces)		○
	• Data management (e.g. master data concepts)		○
ERP Systems		Experience	
	• SAP S/4 HANA: MM, PP, QM, CO, FI, BW, EWM	approx. 2 yrs	
	• SAP R/3: MM, PP, CO, FI, PS, BW, BPC	approx. 10 yrs	
	• BPCS (SSA, Infor)	approx. 5 yrs	
	• JD Edwards (9.1, World [7.3], OneWorld [Xe])	approx. 2 yrs	
	• Marcam PRISM	approx. 2 yrs	
	• Ratioplan (Infor)	approx. 1 ½ yrs	
	• SAP S/4 HANA: MM, PP	approx. 1 yr	
• Baan (SSA, Infor ERP LN)	approx. ½ yr		
• INTEX ERP			

