

## CHIEF OPERATING OFFICER

Change Management • Trusted Authority • Complex Budgeting • Client Care • Performance Development  
• Market Expansion • Cross-Functional Team Development • Strategic & Operational Planning

**As a top award-winning visionary Leader, I have been the catalyst for multi-million dollar bottom line impacts for Fortune 500 market leaders, as well as innovative successes in startup environments.** I have over 15 years of top caliber senior-level experience as an Operational Leader, implementing best practices while working successfully within tight budget constraints. My differentiation is that I can contain or even slash costs while increasing morale, increasing productivity and strategically utilizing resources to create the greatest impact while meeting long-term goals. I see the bigger picture without losing sight of the details and the customer experience. In addition, I implement sound business principles with intentional structure in every company I work with, resulting in wildly successful initiatives and fantastic organizational turnarounds, with an eye on consistent long term growth. As a dynamic team leader in a role as your trusted advisor, I have a passion for managing all aspects of Operations, which allows you to focus exclusively on what you do best. *If you are positioned for growth – or want to be – and you need smart, strategic leadership, let's have a conversation about how I can help you achieve that next level of success for your business.*

- **Catalyst for Stimulating Operational Growth**
- **Cost Control Expert with Impressive Results**
- **Culture Activist utilizing Servant Leadership**

**Key Skills:** Strong executive presence with solid business ethics · Dynamic leader, mentor and collaborator all levels · Strong contract negotiator · Exceptional at financial/budgetary development & analysis for bottom line improvement · Deeply skilled in relationship development in a team-centric environment · Unwavering commitment to excellence.

**M.B.A. in Finance**, California State University, Sacramento, CA, 1997.

**B.S. in Business Administration - Finance**, Cal State University, Sacramento, CA, 1991. Magna cum Laude.

### SELECTED ACCOMPLISHMENTS

**Operational Growth Stimulus** – Designed and executed a financial recovery plan for one employer, **catapulting sales by 500%**, from **\$4.6M to \$23M** over 3-1/2 years. **Improved productivity by 20%** and impacted the bottom line by **over \$2.8M** through the smart use of cross-functional teams and the implementation of a project cost tracking system, resulting in a significant boost in customer satisfaction. Handpicked to lead turnaround of regional consulting firm and to direct complete debt restructuring. **Doubled corporate revenue in 24 months**, from **\$4M to \$8M**, by driving service expansion, later resulting in a successful merger. Additionally, **doubled corporate profits in 18 months** by developing strategic pricing and costing plans. Founded three successful businesses, **growing them by 500%+ over 5 years**.

**Cost Control Expert** – Operated the only unit in a Division requiring no additional funding, even **scaling down FTEs by 26% to save \$37M annually**. **Slashed hardware costs by 1/3<sup>rd</sup>, for a \$5M gain**. Through strategic leverage and wise utilization of resources, **plummeted vendor spend by 66%** while increasing technical productivity, which **saved \$35M over 2 years**. Also led the reconfiguration plan of server utilization for a Division of 13,000 team members, at a projected **savings of \$360M** per year. Increased productivity and efficiencies, **streamlining the budget by \$73M**, a 20% reduction. Led zero-based budgeting efforts to consistently achieve an **annual \$1.25M cost savings for 5 years**. Led the charge to taper IT purchase costs company-wide **by over 25%**.

**Culture Activist utilizing Servant Leadership** – Consistently achieved budgetary goals of **\$365M** through the implementation of zero-based budgeting, ensuring adequate funding for diverse team product and project deliverables. Centralized and standardized multiple operations to position for growth. Selected to participate in & lead “Expert Councils” to **identify and define world class best practices**, including the customer experience. **Awarded highest Division rating** for a non-Engineer. Managed finance, accounting and other business functions for IT Operations division, while designing and administering a **\$50M budget**. Served as IT Operations liaison for **19 major national remote sites**.

### CAREER SUMMARY

**Chief Operating Officer**, Truss, Overland Park, KS 66207, 2016 - 2018

**Chief of Staff, Windows Server**, Microsoft Corporation, Redmond, WA, 2005-2014

**Vice President**, Citigroup Inc. (formerly CalFed Bank), Sacramento, CA, 1996-2004.

**Prior Experience Includes:** **Chief Operating Officer**, Shannon Associates; **Assistant Director of Operations**, Los Angeles Rams Football Company, **President & Co-Founder**, Newport West Insurance Services.

# PATTY BACKMAN, CMA

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## EXECUTIVE BUSINESS LEADER

Extensive expertise in Finance and Operations leadership within regional and international technology and financial services environments. Strong reputation for continuous reinvention of organizations generating team commitment to higher levels of achievement, enhancing team and customer satisfaction and ensuring profitability. Exceptionally effective at strategic and tactical planning with operational implementation. Energetic and resourceful leader known for inquisitive nature, independent thinking, flexibility and sensibility.

## PROFESSIONAL EXPERIENCE

**Truss**, Overland Park, KS

### Chief Operating Officer

**2016 - 2018**

Role was created to establish an environment of Operational Excellence. Operational deficiencies were assessed, benchmarking/productivity standards established and foundational operational functions defined while focusing on the client experience, associate fulfillment & productivity and establishing a culture of accountability.

- Organization restructured for focus on the Client Experience
- Detailed processes defined, standardized and implemented with focus on the Client Experience while significantly increasing productivity
- Performance Development System defined
- Accountability reporting defined and implemented
- Financial Reporting defined, expanded, implemented
- Technology modernized

**Microsoft Corporation**, Redmond, WA

### DIRECTOR OF BUSINESS MANAGEMENT/ CHIEF OF STAFF - Windows Server

**2005 – 2014**

Role was a unique hybrid of several traditional roles – management consulting, project management, strategic planning, operations strategy and execution and financial planning and management - directly supporting the Division leader. Organization size ~ 1,000. **Created and managed division budget of \$365M - \$292M.**

- Provided management consulting to the VP's five direct reports and their organizations of ~ 200 employees each. Identified opportunities for organizational improvements and project managed the process to operationalize these necessary changes.
- Achieved annual budgetary goals through skillful implementation of zero-based budgeting & tracking, managing the process through divergent priorities while aligning the decision-making process across functional areas and organizational levels; ultimately finalizing a budget that ensured each team had adequate resources for product and project deliverables.
- Proactively identified strategic utilization of resources resulting in the consolidation of procurement, contract management and vendor relationship management across the division. Achieved **66% reduction in vendor spend** over two-year period while increasing engineering team productivity.
- Developed and implemented programs to enrich organizational health resulting in better product development decisions: facilitated teams' utilization of individually specified communication skills during team problem solving; facilitated teams' assessment of trust levels, and developed & implemented processes to accomplish successively higher levels of team trust.
- Developed and implemented executive communication plan and meeting cadence including definition of meeting purpose, content development and meeting facilitation/leadership.

**Citigroup (Formerly California Federal Bank)**, Sacramento, CA

**1996 – 2004**

### VICE PRESIDENT, IT Operations Management Office

Managed the department responsible for finance, accounting, and other business services functions of the IT Operations division. Created and managed \$50 million budget/forecast and the consequent financial reporting, directed contract management and administration, procurement and vendor relationship management for Data Center Operations,

Network Operations and Telecommunications. Served as the IT Operations liaison for tactical and strategic planning with the 19 major national remote site offices.

- **Achieved consistent annual cost reduction of 2.5%** of \$50 million budget through implementation of a comprehensive zero-based budgeting process.
- Realized multi-million dollar savings through skillful negotiation and management of contracts relating to hardware and software purchases, leases, telecommunication carrier services and vendor contracting.
- Decreased cost of purchasing desktop and enterprise services hardware and software by 25% enterprise-wide (across all subsidiaries, locations and cost centers) through implementation of a standardized procurement program.
- **Increased productivity 20%** through development and leadership of cross functional teams and implementing a project cost and tracking system focused on cost containment and enhancing customer satisfaction levels related to project deliverables.

## ADDITIONAL PROFESSIONAL EXPERIENCE

**Shannon Associates, Sacramento, CA**

### CHIEF OPERATING OFFICER

Selected to lead the turn-around of this regional public sector consulting firm.

- Managed a complete debt restructure while significantly limiting expense exposure.
- Doubled corporate profits in a year and a half by developing and implementing strategic pricing and cost plans.
- **Accomplished 150% increase in revenue** during second year of corporate restructure after conducting a successful search for a strategic alliance which resulted in a horizontal merger.
- Installed a contemporary accounting and financial reporting system which facilitated key management decision making.

**Pinnacle Insurance Services, Orange, CA**

### OPERATIONS MANAGER

Retained to manage the restructuring of this independent insurance brokerage on the verge of bankruptcy.

- Performed comprehensive analysis of data to inform the design/execution of recovery plan which resulted in a **500% growth in sales to \$23 million** during a 3.5 year period:
  - Diversified the agency's economic base by integrating health and life insurance into the existing portfolio of property and casualty insurance.
  - Implemented a comprehensive marketing strategy while redefining the product and client base.
  - Stabilized excessive staff turnover mitigating the significant backlog of policy service processing by implementing efficient procedures and making appropriate human resource changes.
- Assumed the role of Account Manager for the largest 5% of the commercial accounts. Instrumental in the retention of these accounts until after the brokerage was sold.

**Los Angeles Rams Football Company, Anaheim, CA**

### ASSISTANT DIRECTOR OF OPERATIONS

Assisted Director of Operations in non-player related administrative functions including development of community relations program in conjunction with school district, orchestration of the transfer of workers compensation coverage into self-insured program sponsored by NFL.

**Newport-West Insurance Services, Irvine, CA**

### FOUNDER AND PRESIDENT

Founded this specialty insurance agency and managed daily operations including the coordination and integration of all departments.

**Deloitte, Haskins & Sells, Santa Ana, CA**

### ACCOUNTANT

Provided monthly financial reporting for small business clients including payroll, sales and income tax reporting.

**EDUCATION**

**Master of Business Administration** - California State University, Sacramento, CA  
**Bachelor of Science in Business Administration**, California State University, Sacramento, CA **Magna cum Laude**

**CERTIFICATIONS**

**Certified Management Accountant (CMA)**  
**Software Program Management** – University of Washington