

David Allen

Financial Transformation | Financial Systems Leader | Global Controller

858-761-1923 dmallen@gmail.com linkedin.com/in/davidmichaelallen davidmallen.com Baltimore-Washington Metro Area

SUMMARY

Financial systems and transformation leader with 15 years in accounting and finance, including eight years leading ERP modernization and global finance operations. Aligns executives, finance teams, and technology partners around ERP strategy, data governance, and scalable operating models. Combines systems leadership with experience as Global Controller of a six-country business and leader of a 19-person accounting organization.

KEY ACHIEVEMENTS

Enterprise Architecture and High-Risk Remediation

Repeatedly selected to stabilize distressed Salesforce and NetSuite ecosystems, rebuild ERP architecture, and strengthen compliance, revenue controls, and data integrity across high-growth technology companies.

Close-to-Report Transformation

Reduced month-end close from 15 to 8 days at a global technology business and by approximately 10 days at a cybersecurity firm by optimizing reconciliations, FloQast processes, system dependencies, operational handoffs, and critical accounting workflows.

Scalable ERP and Automation Frameworks

Designed enterprise-grade NetSuite architectures and iPaaS automation frameworks (Workato, Celigo, Boomi, and Jitterbit) that replaced failing connectors, standardized master data, and automated core finance, billing, and revenue workflows.

Multi-Entity Finance Architecture

Designed entity hierarchies, chart of accounts, consolidation approaches, and intercompany frameworks across six-country and cross-border environments. Led ERP evaluation and transformation planning for a five-country technology company.

CORE COMPETENCIES

Financial Systems Architecture, Enterprise Data Architecture, ERP Selection and Evaluation, ERP Optimization, Multi-System Integrations, System Governance and Operating Model, P2P / O2C / R2R Process Design, Close Optimization, Segmentation and COA Design, Data Governance, Integration Strategy, System Controls and Auditability, AI-Enabled Close Optimization

EXPERIENCE

Founder & Principal | Financial Systems & ERP Transformation

Dayton, MD (Remote)

NuViTech

07/2021 - Present

Independent consulting practice delivering project-based finance systems and transformation engagements alongside corporate leadership roles. Combines controllership experience, ERP strategy, and implementation oversight.

- **Executive & Board Partnership:** Advise leadership teams and board members on finance systems strategy, transformation priorities, and implementation decisions.
- **ERP Strategy & Evaluation:** Led transformation planning and ERP evaluation for a five-country technology business, assessing operational fit, integration needs, and cross-border requirements.
- **Data Governance:** Guided planning across 40+ data domains, addressing ownership, remediation priorities, and migration readiness.
- **Program & Partner Governance:** Chaired the Transformation Management Committee, reported to the Steering Committee, and managed delivery-partner scope, quality, and decision readiness.
- **Functional Solution Design:** Lead NetSuite access and reporting design, translating business rules into documented requirements, solutions, and stakeholder decisions.
- **Delivery & Adoption:** Coordinate access-control delivery through build and iterative testing, aligning business and technical teams on permissions, reporting boundaries, and user readiness.

Global Controller | Director of Accounting | Director of Financial Systems

New York, NY (Remote)

Andela

12/2022 - 11/2025

Global Controller (02/2025–11/2025) • Director of Accounting (09/2024–02/2025) • Director, Financial Systems (12/2022–09/2024)

Promoted twice to lead global accounting and the enterprise financial systems roadmap for a high-growth, VC-backed technology organization across six countries. Reported to the CEO and served as primary Audit Committee liaison.

- **Systems Ecosystem Modernization:** Stabilized NetSuite through segmentation redesign and reporting cleanup, reimplemented Coupa, and deployed TeamPay and Navan to strengthen automation, controls, and data integrity.
- **Integration Architecture:** Replaced failing native connectors with Workato (iPaaS) automation, resolving billing and payment sync failures and restoring Salesforce and NetSuite revenue data integrity.
- **Close Optimization:** Reduced global close from 15 to 8 days through stronger reconciliations, FloQast workflows, AI-assisted variance explanations, and NetSuite improvements. Completed the annual audit one month earlier than the prior year.
- **Tax and Compliance Architecture:** Scoped Avalara readiness and the Salesforce/NetSuite tax data flows required to support it, quantified multi-jurisdiction exposure, and negotiated the platform and implementation contracts ahead of execution.
- **Global P2P Transformation:** Rebuilt Coupa and Navan P2P workflows and strengthened approval architectures, using AI-assisted documentation and analysis to improve compliance, vendor governance, and international spend visibility.
- **Process Automation:** Converted multi-day GAAP department allocation processes into a one-hour process in NetSuite, improving segment reporting accuracy and eliminating manual operational work.

EXPERIENCE

Director of Financial Systems | Accounting Systems Project Manager

Arlington, VA (Remote)

Interos

10/2021 - 01/2023

Director of Financial Systems (12/2021–01/2023) • Accounting Systems Project Manager (10/2021–12/2021)

Promoted within three months to lead enterprise financial systems strategy during rapid scale. Stabilized NetSuite, rebuilt financial architecture, and strengthened cross-functional governance across RevOps, Accounting, FP&A, IT, and People.

- **ERP Stabilization and Financial Architecture:** Remediated NetSuite by redesigning segments, GL, subsidiaries, and access controls; moved the business off NetSuite ACS to a scalable support model, improving system stability and reporting.
- **Revenue Systems, CPQ, & SaaS Metrics:** Partnered with RevOps to rebuild CPQ logic, pricing, product catalog design, and revenue definitions; executed Salesforce metadata cleanup and co-authored a SaaS metrics bible, improving ARR/MRR reporting alignment.
- **Cross-Platform Data Governance:** Established enterprise metadata governance with RevOps, FP&A, and IT, aligning Salesforce, CPQ, and NetSuite structures; eliminated inconsistencies that previously caused reconciliation and reporting errors.
- **Procurement, P2P, & T&E Transformation:** Led RFPs for P2P and T&E, implemented Navan, and partnered with IT to design Jira procurement workflows; improved intake, approval visibility, and audit traceability.
- **Release Management & Controls Framework:** Implemented structured intake, prioritization, UAT, and release cycles; built approval matrices for JE, procurement, AP, and system changes, strengthening ITGC maturity and operational governance.

Manager, Finance and Financial Systems

Silver Spring, MD (Remote)

Summit Group

03/2020 - 10/2021

Owned NetSuite administration, Dell Boomi integrations, and core Finance operations for a high-volume promotional products company. Modernized O2C processes, improved system performance, and delivered substantial cost and productivity gains.

- **Quote-to-Cash Stabilization:** Cleared a multimillion-dollar billing backlog and reduced the billing cycle from 45 to 15 days by redesigning O2C workflows and correcting order, billing, and revenue flow logic.
- **Integration Performance:** Improved system stability across billing, payroll, and procurement by tuning Dell Boomi integrations, resolving failure patterns, and strengthening cross-system dependencies.
- **Operational Cost Optimization:** Delivered more than \$200K in annual savings through workflow automation, license rationalization, and vendor renegotiations.
- **System Performance Engineering:** Optimized NetSuite workflow performance, eliminating ~550 hours of manual effort annually.

Assistant Controller

Washington, DC

Great Minds

09/2019 - 03/2020

Revenue Manager | Senior Accountant

Bethesda, MD

Fidelis Cybersecurity

12/2017 - 09/2019

Assistant Controller

Twin Falls, ID

Waste Connections

11/2015 - 11/2017

Senior Accountant - Controller Trainee

Salt Lake City, UT

AgReserves

04/2014 - 11/2015

Experienced Associate | Intern

Baltimore, MD

PwC

01/2011 - 03/2014

SYSTEMS AND TOOLS

ERP and Core Financials

NetSuite (OneWorld, ARM, Account Reconciliations, and Workflows), Sage Intacct, Infor, Epicor, and QuickBooks

Billing, Revenue, and Commissions

Salesforce CPQ, Stripe, Chargebee, Gaviti, Xactly, CaptivateIQ, and Avalara

HRIS, Payroll, and Equity

Workday, Rippling, Paylocity, ADP Workforce Now, and Carta

Close Management, Reporting, and Analytics

FloQast, Adaptive Insights, Looker, Excel, and Solutions 7

P2P, Procurement, AP, and Travel

Coupa, Bill.com, Navan, Teampay, and Concur

Integrations and iPaaS

Workato, Celigo, Dell Boomi, Jitterbit, and API-based Integrations

EDUCATION

Master of Science, Accounting

College Park, MD

University of Maryland - Robert H. Smith School of Business

08/2012

Bachelor of Science, Accounting

Rexburg, ID

Brigham Young University - Idaho

04/2011

CERTIFICATIONS

Oracle NetSuite Certified Administrator Professional

Coupa Procure-to-Invoice System Administration