

Mary Kay Copeland, CPA, MBA, MA, PhD

OBJECTIVE

TEACHING INTEREST: Financial and Managerial Accounting, Intermediate Accounting, Advanced Accounting Theory, ERP Systems, Accounting Information Systems (Digital Transformation with Data Synthesis, Analysis and Visualization), Auditing, Leadership and Entrepreneurship

RESEARCH INTEREST: Accounting and ERP Information Systems, The Impact of Technology on Audit and the Accounting Profession, Firm Profitability and Efficiency, Ethical and Values Based Leadership

EDUCATION

Regent University

PhD – School of Business and Leadership/Concentration: Entrepreneurship, 2013, GPA: 3.95/4

- Dissertation: The Importance of Ethical Leadership in the Accounting Profession – Examined ethics and leadership in Top 100 CPA firm. Distinguished scholar, Ronald Huefner (University of Buffalo) on dissertation committee.
- PRJ published from dissertation won two awards: 1) American Accounting Association Best Research Paper in 2013 (Recent PhD Graduate, Annual International Conference – Ethics Symposium) and 2) Outstanding Author Contribution in the 2016 Emerald Literati Network Awards for Excellence, Emerald Publishing, Most read contribution to journal, 4 years, 17,000+ downloads to date.

Northeastern Seminary

Master's in Theological Studies, 2018, 4/4.0

- Master's Thesis – Five Faith Integration Lessons for Business Students

University at Buffalo

B.S. /M.B.A (MBA, 60 Hr. Graduate Accounting degree, 18 graduate credit hours in accounting, in Accounting Masters/PhD track)

- AACSB accredited, Ranked #31 Nationally for Public Universities
- Vice President of Beta Alpha Psi – Accounting Honor Society
- Beta Gamma Sigma – AACSB Business Honor Society
- Taught eight sections of Introduction to Accounting to undergraduates as a graduate student
- Magna Cum Laude, GPA: 3.67/4.0

AACSB STATUS

AACSB Qualifications for SA status to teach Accounting include:

- CPA,
- Completion of 18 graduate credit hours in accounting from an AACSB accredited school (in Accounting PhD Track), University of Buffalo (Graduate Accounting Classes at University of Buffalo – Cost, Tax, Auditing, Advanced Accounting, Accounting Theory and Research, Governmental and NFP, Business Law) (US top Ranked Accounting PhD program, at time of coursework)
- PhD in related discipline
- 30+ years of professional experience in accounting profession
- Consistent publications in accounting
- CFO and Professional leadership positions in accounting
- Assessment of SA recommended by AACSB Chief Accreditation Officer, Jerry Trapnell, CPA, PhD

ACADEMIC POSITIONS

Palm Beach Atlantic University AACSB Accreditation, Expected 2023	Professor of Accounting and Info Systems Chair, Master of Accountancy Program Chair, AACSB Committee through EA Director of Enterprise Systems Education	2017-Present 60+ Courses
St. John Fisher College AACSB Accredited	Assistant Professor of Accounting Graduate and Undergraduate Courses	2012-2017 50+ Courses
Canisius College AACSB Accredited	Visiting Professor of Entrepreneurship Prior to completing PhD	2011-2012 6 Courses
Rochester Institute of Technology AACSB Accredited	Accounting Adjunct Professor	2010 - 2011 4 Courses
Bowling Green State University AACSB Accredited	Accounting Instructor Financial and Managerial & MIS	1993-1996 20 Courses
Microsoft Business Solutions Accounting Information Systems ~ Managerial Information Systems Course participants were mid/top tier accounting and financial professionals	Director/Lecturer	1995 - 2011 25 Courses
KPMG Developed and taught the first firm wide AIS Course. Co-authored training materials.	Lecturer/ Course Developer and Author	1988-1989 4 Courses
SUNY Buffalo AACSB Accredited	Instructor Taught Accounting Principles Course	1981-1983 8 Courses

Noteworthy Accomplishments at Palm Beach Atlantic University

- Leading scholar/researcher in discipline, mission alignment and business school with strong ABDC PRJ publication record and pipeline.
- Developed, prepped, and taught every course in Undergraduate and MAcc curriculum with the exception of US Tax II (15 different course preps).
- Proposed, secured approval, and implemented five new programs for the Master of Accountancy and the Enterprise Systems (ERP/AIS) programs in first three years.
- Very strong course teaching evaluations by students and supervisors. - 6.7 out of 7 for on premise courses and 6.8 out of 7 for online courses.
- Chair of AACSB Accreditation committee through Eligibility Application approval. Completed project plan, project implementation and Eligibility Application submission in first year.
- Chair of AACSB Research Committee.
- Evaluated as Exemplary in categories: Teaching, Scholarship and Service when university standard is to minimally recognize faculty as exemplary.

Teaching Noteworthy Accomplishments at St. John Fisher College

- Developed sixteen new course preps (different courses) in four years.
- Developed four new programs.
- Overall average course evaluations for all courses - 6.2 out of 7 for on premise courses and 6.7 out of 7 for online courses.
- Supported and mentored students who won NY state business plan competition.

Courses Developed and Taught

Courses Taught at Palm Beach Atlantic University

ACG 2013	Financial Accounting
ACG 2023	Managerial Accounting
ACG 3113	Intermediate Accounting I
ACG 3123	Intermediate Accounting II
ACG 3163	Accounting Information Systems
ACG 4133	Auditing
ACG 4143	Cost Accounting
ACG 5113	Advanced Accounting Theory
ACG 5133	Advanced Auditing
ACG 5153	Financial Statement Analysis
ACG 5123	Advanced Financial Acc.& Reporting
ACG 5213	ERP Systems 1 - Introduction to ERP Systems
ACG 5223	ERP Systems 2 – Understanding Business Processes
ACG 5533	ERP Systems 3 – Data Analysis and Analytics
BUS 5123	ERP Systems - Customer Relationship Management Systems

New Programs Developed at Palm Beach Atlantic University

- Master of Accountancy – Distance learning enabled
- Master of Accountancy – Accounting Studies Concentration
- Certificate in Accounting
- Enterprise Systems MBA Concentration
- Enterprise Systems Graduate Certificate
- Microsoft Dynamics ERP Academic Alliance

Courses Developed/Taught at St. John Fisher College

ACCT 101	Principles of Accounting I
ACCT 102	Principles of Accounting II
ACCT 201	Intermediate Accounting
ACCT 430	Accounting Information Systems – Undergraduate – Online
GMGT 648	Accounting Information Systems
GMGT 682	Integrated Advanced Accounting and Finance
GMGT 671	Special Topics: Customer Relationship Management
GMGT 672	Special Topics: Entrepreneurship
GMGT 651	ERP 1 - Introduction to ERP Systems
GMGT 652	ERP 2 - CRM, Sales and Cash Processes
GMGT 653	ERP 3 - Supply Chain – Procure to Pay
GMGT 654	ERP 4 - Enterprise Reporting, CPM and Data Analytics

New Programs Developed at SJFC

- Microsoft Dynamics ERP Academic Alliance
- Microsoft Dynamics CRM Boot camp and coursework
- Entrepreneurship / SME MBA Concentration (Assisted in Development)
- NYS Business Plan Semi Finalist Competition at SJFC
- Enterprise Systems and Data Analytics –Proposed MBA Concentration and Online Graduate Certificate

SCHOLARSHIP/PUBLICATIONS

Publications: Peer Reviewed Journal Articles Published (Double Blind Review):

1. Copeland, M.K. & Barnhart, C. (2022). Biblical Perspectives on Free Trade. *Journal of Biblical Integration in Business*. (Published). (Mission Aligned RSB Journal)
2. Hayes, J, Smith, D, and Copeland, MK (2022) Determinants Impacting Resale Premium Disparity When Selling a Small Business: A Predictive Non-Linear Approach: *Journal of Business and Economic Studies*. **26(1)** (ABDC C Journal)
3. Copeland, M.K. & Smith, D. (Fall 2021). A Predictive Classification Approach to Examining Components of Ethical and Transformational Leadership Contributing to Leader Effectiveness in the Accounting Profession. *Research on Professional Responsibility and Ethics in Accounting*, **24(1)**, 149–171 ISSN: 1574-0765/doi:10.1108/S1574-076520210000024008. (ABDC B Journal)
4. Crossan, W., Copeland, M.K. & Barnhart, C. (2021). The Importance of Values Based Leadership in Sport Coaching. *Sport in Society*. (Nov 2021). (ABDC B Journal) <https://www.tandfonline.com/doi/full/10.1080/17430437.2021.1996345>
5. Copeland, M.K, Kennedy, J., and Lee, V. (2021). A Research Framework for Measuring Multiple Bottom Lines. *Journal of Applied Business and Economics*, **23(2)**, 13-24. (AACSB C Journal)
6. Copeland, M. K. & Mahsud, R. (2020). Exemplary Customer Service: Strategies for Establishing a Competitive Advantage and Improved Financial Outcomes. *Graziadio Business Review*, **23(2)**.<https://gbr.pepperdine.edu/2020/09/exemplary-customer-service/> (Evaluated as equivalent to ABDC B Journal, Rutgers Business Review)
7. Copeland, M. & Barnhart, C.(2020). Understanding the Ignored Miracle of the Dark-Skinned Eunuch - Ideological Texture Analysis of Acts 8:26-40. *Journal for Biblical Perspectives in Leadership*, **10(1)**, 3-24. (Mission Aligned RSB Journal)
8. Copeland, M. & Cabanda, E. (2018) Efficiency Measurement in the U.S. Publicly Held Insurance Industry: A Two-Stage Efficiency Model. *International Journal of Information Systems in the Service Sector (IJISSS)*, **18(1)**.
9. Copeland, M. K. (2016). The Impact of Authentic, Ethical, Transformational Leadership on Leader Effectiveness. *Journal of Leadership, Accountability and Ethics*, **13(3)**, 79-97. <http://search.proquest.com.proxy.pba.edu/docview/1888686924?accountid=26397> (ISSN# 1913-8059),
10. Copeland, M. (2015). The Impact of Ethical Leadership on Leader Effectiveness in the Accounting Industry. *Research on Professional Responsibility and Ethics in Accounting*, **19(1)**. Emerald Group Publishing Limited, pp. 61-98. <https://doi.org/10.1108/S1574-076520150000019012> (ABDC B Journal) Awarded the Outstanding Author Contribution in the 2016 Emerald Literati Network Awards for Excellence for this article. 40,000+ downloads, most downloaded publication in RPREA publication to date.
11. Copeland, M. (2014). The Emerging Significance of Values Based Leadership, A Literature Review. *International Journal of Leadership Studies*, **8(2)**.

12. Copeland, M. (2014). Should Accounting Programs Jump on Board: Considerations, Best Practices and Benefits of Online Accounting Coursework. *Business Education Forum*.
13. Copeland, M. K. (2014). The Importance of Ethical Leadership in the Accounting Industry (Order No. 3570897). Available from ABI/INFORM Collection. (1420266278). <http://search.proquest.com.proxy.pba.edu/docview/1420266278?accountid=26397>
14. Copeland, M. (2010). Marketing and Advertising for the CPA: Leading-Edge Strategies. *The CPA Journal*, Aug 2010.
15. Copeland, M. (2010). Strategies for Developing Entrepreneurs: Nature or Nurture. *MBA Review*, 9(3), 16-23.
16. Copeland, M. (2009). An Entrepreneurial Mindset: The Essential Component for a Competitive Edge. *MBA Review*, 8(7), pp. 32-36.
17. Copeland, M. (2009). HR Strategies in Seemingly Adverse Economic Times. *HR Review*, 9(5), 48-53.

Publications: Peer Reviewed Conference Proceeding Publications (Double Blind Peer Reviewed):

Copeland, M. (2014). Research Framework for Measuring Multiple Bottom Lines. *American Accounting Association, 2014 Annual International Conference Proceedings Publication*.

Copeland, M. (2014). Assessing and Measuring Financial and Accounting Consulting Success - A Case Study Providing a Proposed Assessment Methodology. *American Accounting Association, 2014 Annual International Conference Proceedings Publication*.

Copeland, M. (2014). Management Accounting - Improving Financial Outcomes through Flexible Leadership. *American Accounting Association, 2014 Annual International Conference Proceedings Publication*.

Copeland, M. (2013). The Impact of Ethics and Ethical Leadership in the Accounting Profession. (Awarded Best Research/Best Paper for a Recent PhD Graduate at the AAA Annual International Meeting - Ethics Symposium). *American Accounting Association, 2013 Annual International Conference Proceedings Publication*. Awarded Best Research Paper for Recent PhD graduate.

Copeland, M. (2013). Improving Critical Thinking through Effective Pedagogy for Online Coursework. *American Accounting Association, 2013 Annual International Conference Proceedings Publication*.

Copeland, M. (2010). Benefits, Limitations and Best Practices of Online Coursework...Should Accounting Programs Jump on Board? *American Accounting Association, 2010 Northeast Proceedings Publication*.

Copeland, M. (2009). The Impact of Authentic, Ethical, Transformational Leadership on Leader Effectiveness. *Southern Management Association 2009 Proceedings Publication*.

Publications: Textbooks (Peer Reviewed):

Turner, L.; Weickgenannt, A. & Copeland, M. (2022). *Accounting Information Systems: The Processes and Controls*, 5th Edition. Hoboken, NJ: John Wiley & Sons, Inc.

Turner, L.; Weickgenannt, A. & Copeland, M. (2020). *Accounting Information Systems: The Processes and Controls*, 4th Edition. Hoboken, NJ: John Wiley & Sons, Inc.

Turner, L.; Weickgenannt, A. & Copeland, M. (2017). *Accounting Information Systems: The Processes and Controls*, 3rd Edition. Hoboken, NJ: John Wiley & Sons, Inc.

Copeland, M. (2016). *The Importance of Ethics and Ethical Leadership in the Accounting Profession*. Saarbrücken, Germany: LAP Lambert Academic Publishing.

Arens, A., Ward, D., Latham, C., Copeland, M. (2014). *Cloud Based Computerized Accounting using Microsoft Dynamics GP2013*. Okemos, Michigan: Armond Dalton Publishing.

AIS Course Materials:

Copeland, M. (2022). Understanding ERP and Accounting Information Systems using Microsoft Dynamics GP. Microsoft Academic Alliance Coursework. Utilized by schools throughout the US.

Copeland, M. (2022). Understanding ERP Systems and Business Processes using Microsoft Dynamics 365 FO. Microsoft Academic Alliance Coursework.

Copeland, M. (2022). Understanding Microsoft Dynamics 365 BC. Microsoft Academic Alliance Coursework.

Copeland, M. (2022). Concepts in Customer Relationship Management Systems using Microsoft Dynamics 365 Sales. Microsoft Academic Alliance Coursework.

Copeland, M. (2017) - Introduction to ERP Systems using Microsoft Dynamics AX. Seattle, WA: Microsoft Academic Alliance Coursework.

Publications: Book Chapters:

Copeland, M. (2011). Values Based Leadership. In Gandolfi, F. (Ed.), *Foundations of Contemporary Leadership* (pp144-171). Köln, Germany: LAP Lambert Academic Publishing.

Becker CPA CPE Courses/Seminars

Created and presented the following Continuing Professional Education Seminar
2022 – What is ERP Software and Digital Transformation and Why are they Important?

In Process, Not Yet Presented

2022 - Selecting an ERP System – Important Considerations

2022- Comparison of Top ERP Vendors

CONFERENCE PRESENTATIONS

American Accounting Association – Annual International Conference – Aug 2020 (Virtual)

- Panel – Accounting Data Analytics – Presenter and Panel Leader – The Impact of Data and Data Analytics on the Accounting and Business Professions

Palm Beach Atlantic University Interdisciplinary Research Conference- March 2022

- Paper Presentation - A Predictive Classification Approach to Examining Components of Ethical and Transformational Leadership Contributing to Leader Effectiveness in the Accounting Profession.

American Accounting Association – Annual International Conference – Aug 2020 (Virtual)

- Panel – Audit Technology – Presenter and Panel Leader – The Impact of Technology and Data Analytics on the Audit Profession

American Accounting Association – Annual International Conference – 2019

- Presentation - Utilizing AIS/ERP Cloud Software in accounting coursework– Effective cloud-based ERP, AIS, and Data Analytics Hands on Curriculum.

American Accounting Association – Northeast Regional Conference – 2018

- Invited Presentation, Adding Hands on Learning in Accounting Information Systems Courses, Northeast American Accounting Association, October 19, 2018.
- Facilitator and Presenter. On-line coursework Best Practices and Strategies for Improving Student Outcomes. Northeast American Accounting Association. October 20, 2018.

American Accounting Association – Annual International Conference – 2017

- Panel Facilitator/Panel Presenter - Utilizing AIS/ERP Cloud Software in accounting coursework– Effective cloud based ERP, AIS, and Data Analytics Hands on Curriculum.
- ELS Presentation – Including Cloud Based ERP/Accounting Systems in Accounting Coursework - Easy to Deploy options for Hands Accounting and ERP Systems Learning

American Accounting Association – Southeast Conference – 2017

- ELS Presentation - Including Cloud Based ERP Systems and Data Analytics Software in Accounting Coursework - Easy to Deploy options for Hands Accounting and ERP Systems Learning

American Accounting Association – Northeast Conference – 2017

- ELS Presentation – Including Cloud Based ERP/Accounting Systems in Accounting Coursework - Easy to Deploy options for Hands Accounting and ERP Systems Learning

American Accounting Association – Northeast Regional Conference – 2016

- Panel Facilitator/Panel Presentation - On-line coursework Best Practices and Strategies for Improving Outcomes.
- Invited Session Presentation - On-line Accounting Homework Managers – Facilitating Improved Learning Outcomes.

American Accounting Association – Annual International Conference – 2015

- Emerging/Innovative Research - Sustainability and Measuring What Matters – ERP and Lean Production and Accounting – Complimentary or Contradictory?
- Conference for Teaching and Learning Presentation - Adoption of Online Accounting Coursework - Strategies and Lessons Learned for Maximizing On-line Learning Effectiveness (Teaching and Technology Roundtable).
- Conference for Teaching and Learning Presentation - Including ERP and Financial Reporting and Analysis Cloud Options in Accounting Coursework.

American Accounting Association – Annual International Conference – 2014

- Field Studies in Management Accounting – Paper Presentation: Assessing and Measuring Financial and Accounting Consulting Success - A Case Study Providing a Proposed Assessment Methodology.
- Research Interaction Forum Session - Public Interest Section - Research Framework for Measuring Multiple Bottom Lines.
- Research Interaction Forum Session - Management Accounting Section - Paper Presentation: Improving Financial Outcomes through Flexible Leadership.
- Conference for Teaching and Learning Presentation - Adding Hands on Learning – Cloud Computing Options for Accounting Coursework.

American Accounting Association – Northeast Regional Conference – 2014

- Public Interest Section – Paper Presentation - Sustainability and Measuring What Matters - Research Framework for Measuring Multiple Bottom Lines.
- Session Presentation - Pedagogy and Strategies to Maximize Learning in On-line courses.

- Session Presentation - Boot camp - Adding easy to adopt, hands on learning of Quick books or Microsoft Dynamics Great Plains to any accounting course.
- Session Presentation - On-line Accounting Homework Tools - Pros, Cons and Strategies.

American Accounting Association – Annual International Conference –2013

- Ethics Symposium Paper Presentation - The Impact of Ethics and Ethical Leadership in the Accounting Profession. (Also presented at Northeast AAA Conference in 2013) – Awarded Best Research Paper by a recent PhD graduate.
- CTLA Presentation - Adding Hands on Learning of Accounting Systems to Undergraduate and Graduate Coursework. . (Also presented at Northeast AAA Conference in 2013).
- Paper Presentation - Improving Critical Thinking through Effective Pedagogy for Online Coursework.

American Accounting Association – Northeast Regional Conference – October 2010

- Paper Presentation - Benefits, Limitations and Best Practices of Online Coursework...Should Accounting Programs Jump on Board?

Conclave for Leadership Research and Analysis – May 2010

- Paper Presentation - Values Based Leadership and Leader Effectiveness

Southern Management Association – November 2009

- Paper Presentation – The Authentic, Ethical and Transformational Leadership Model (Research Study)

American Accounting Association – Northeast Regional Conference – November 2009

- CTLA – Poster Session - Incorporating Accounting Software Coursework into Accounting Curriculum

GRANTS WRITTEN, APPLIED AND AWARDED

- PBA – Summer Research Grants – 2021 - \$3,200
- PBA – Summer Research Grants – 2020 (Cancelled due to COVID-19)
- PBA – Summer Research Grants – 2019 (Awarded) – \$4,000
- PBA – Summer Research Grants – 2018 (Awarded) - \$2,400
- Microsoft – National Coursework Development – 2015- \$55,000
- SJFC – Strategic Initiatives – 2015- \$35,000
- SJFC – Summer Faculty Development – 2016 - \$4,000
- SJFC – Summer Faculty Development – 2015 - \$4,000
- SJFC – Summer Faculty Development – 2014 - \$3,050
- SJFC – Summer Faculty Development – 2013 - \$350
- SJFC – Summer Travel Grant – 2016 - \$1,000
- SJFC – Summer Travel Grant – 2015 - \$1,000
- SJFC – Summer Travel Grant – 2014 - \$1,000
- SJFC – Summer Travel Grant – 2013 - \$1,000
- PhD Consortium Grant – Southern Management Association - Recipient of Doctoral Consortium Participation Grant (Travel and conference costs) - \$2,500

Nominations:

- Kauffmann Junior Faculty Fellow Grant – 2016
- Kauffmann Junior Faculty Fellow Grant – 2015

Scholarly Research: Supported and instructed 10 accounting students in conducting scholarly research.

EDITORIAL BOARDS and REVIEW ACTIVITIES:

- Accounting Coursework Review –Western Governor’s University – Financial Accounting – December 2016

- Accounting Coursework Review –Western Governor’s University – Managerial Accounting – December 2016
- Accounting Program Assessment Review –Master’s in Accountancy - Western Governor’s University – September 2016
- Accounting Program Assessment Review –Undergraduate Accounting Program - Western Governor’s University – August 2016
- Editorial Board - Journal of Leadership and Management
- Editorial Board – Northeast Region American Accounting Association
- Editorial Board – Microsoft Business Solutions Academic Alliance
- Reviewer- Sustainability – Peer Review Journal
- Editor – Revenue Management Text – Ronald Huefner, PhD, CPA
- Paper Reviewer – Sage Open - Ethical Standards of Scientific Research for Beginning Accounting Scholars
- Paper Reviewer – Annual and NE Region Conference Proceedings, American Accounting Association (2010 - 2019).
- Paper Reviewer – Southern Management Association Conference – 2009; 2013; 2015

OTHER SCHOLARLY ACTIVITIES:

- AAA – Northeast Region – Council Representative - (Peer elected) – American Accounting Association (AAA) – 2021-2024
- Conference Chair (Peer elected) – Northeast Regional AAA – 2015-2016
- Paper Chair (Peer elected) – Northeast Regional AAA –2014- 2015
- Assistant Chair (Peer elected) – Northeast Regional AAA – 2013- 2014
- Research Paper Reviewer – Annual International AAA Conference – 2013-2019
- Research Paper Reviewer – Northeast AAA Conference – 2013-2019
- Discussant – Annual International AAA Conference – 2013-2020
- Discussant – Northeast Regional AAA Conference – 2013-2019
- Moderator – Northeast Regional AAA Conference –2015, 2018, 2019
- Discussant – Southern Management Association – November 2009
- Selected Participant – American Accounting Association Doctorial Consortium– 2010-2012
- Selected Participant and Scholarship Recipient – Southern Management Association Doctorial Consortium– 2009
- SJFC Curriculum and Instruction Committee -2014-2017 (2016-17 Vice Chair)
- SJFC Provost lead, Academic Planning Committee -2014-2015

OTHER PROFESSIONAL ACADEMIC ACCOMPLISHMENTS:

Business Plan Promotion and Development – Sponsored, mentored and supported 26 student teams who have entered the Rice and New York State Business Plan Competitions. In 2014, two student teams achieved semi-final recognition and one received a statewide award. In 2012, a student team received statewide award.

Microsoft Business Solutions Premier Institution – authored and secured distinction for Palm Beach Atlantic and SJFC as a premier Microsoft Dynamics Academic Alliance institution. This allows universities unlimited access to Microsoft Dynamics ERP systems, training and support. This affiliation enables faculty to include Dynamics ERP software in coursework for students.

Entrepreneurs on Campus – Established professional organization called Entrepreneurs on Campus. This organization was made up of successful entrepreneurs in the community who were interested in supporting the expansion of entrepreneurship at the college and in the community.

PROFESSIONAL EXPERIENCE

Wipfli, LLP

2022-Present

Director, ERP Implementation Services, GP

- Personally recognized by Microsoft and clients as subject matter expert on advanced accounting issues and automation of multi-national corporate consolidations, foreign currency translation and other topics
- Initiated and coordinated business development efforts, exceeding goals by 250%
- Designed and established consulting methodologies for systems implementations, business process improvements and business planning
- Recruited, trained, and supervised consulting staff
- Developed and managed projects for publicly and privately held entities

AA Dynamics Training

2016-2022

Principal, Director of Enterprise Systems Education, Project Based, part time

- Developed Microsoft Dynamics 365 FO, 365 BC and 365 Sales and Dynamics GP bootcamps, coursework and courses for students and professionals
- Provided training and on boarding support for students and partners
- Authored numerous textbooks featuring Microsoft Dynamics GP, AX, 365 FO, BC, and Sales
- Provided Value Added consulting to firms seeking to improve operations and maximize their investment in ERP software

The Copeland Group, Consulting, Project Based, part time

Principal, Director of Midmarket Financial, Strategic Leadership and Systems Consulting

CFO and Strategic Management Services

2008-2016

CFO, Catalyst, Part Time

2 Years

- Created strategic plan, consolidated financial projections, and maintained budgets
- Implemented new ERP system, including project accounting and divisional reporting
- Managed bank and lending covenants
- Managed financial operations of midsized private entity

Financial and Board Advisor, Adaptive-Automation, LLC

6 Years

- Developed merger and acquisition strategy
- Created short term and long-term strategic plans and consolidated financial projections
- Developed capitalization plan and met with potential investors
- Implemented new ERP system
- Managed bank and lending covenants
- Managed financial operations of midsized private entity

Interim CFO and Director of Strategic Initiatives, Anthony Jordan Health Center

3 Years

Assessed feasibility of acquiring additional health centers which doubled the size of the organization from 12 to 25 million. Outcomes included:

- (1) proposed and negotiated highest Medicaid rate increase in center's history
- (2) within 90 days, developed and successfully executed plan to secure 5 million in grant and stakeholder transitional funding, exceeding initial target by 1000%
- (3) Directed the transition of medical services, 100 employees, 19,000 patients to new organization in 90 days
- (4) Implemented Microsoft Dynamics GP financial accounting system in 30 days, enabling strategic reporting and expansion

Navint Consulting, LLC

Director of Midmarket Consulting

Microsoft Business Solutions Practice Director

2003-2008

- Increased Rochester based CFO consulting and software revenues for division by 225% in the first full year in position
- Assisted and supervised project management, business process reviews, business process improvement, ERP systems implementations and other CFO consulting efforts
- Senior Accounting Technical Consultant locally and nationally for the firm and for Microsoft
- Recruited, trained and supervised team, resulting in the most profitable MBS office in the firm
- Personally recognized by Microsoft and the community for outstanding customer service, accomplishments and financial credentials

Schiesser-Copeland Consulting, LLC. (The Copeland Group)

1991-2003

Founder/CEO/CFO

- Established and grew regional consulting firm that implemented automated accounting and ERP systems and provided CFO for hire services
- Recognized by Microsoft and community as the premier MS Business Solutions consulting firm in region
- Personally recognized by Microsoft and clients as subject matter expert on advanced accounting issues and automation of multi-national corporate consolidations, foreign currency translation and other topics
- Initiated and coordinated business development efforts, resulting in a 400% growth over 4 years
- Expanded company to a per employee revenue of \$500,000 per consultant by adopting a client-first protocol
- Designed and established consulting methodologies for systems implementations, business process improvements and business planning
- Recruited, trained and supervised consulting staff
- Developed and managed projects for publicly and privately held entities
- Sold company to Navint Consulting

PSInet

1988-1991

Chief Financial Officer

- Initial CFO of start-up company, the first in the world to connect commercial entities to the internet and build the commercial world wide web internationally
- Collaborated with senior management team and developed business and strategic plans
- Secured all start-up financing, initial venture capital investment and assisted with initial private and public stock offerings
- Responsible for securing \$10 million in financing in PSInet's initial year of operations (Bank loans and Government Grants)
- Managed implementation of corporate financial policies, internal controls, and ERP system for entity with high growth and complex technology

KPMG

Staff through Manager in Audit/Advisory Services

1983– 1988

- Developed and managed first upstate New York mid-market accounting systems consulting practice
- Authored and taught firm-wide mid-market micro computer implementation methodologies course
- Hired, trained and supervised staff
- Supervised and participated in Private Business Advisory Services' consulting engagements including: developing business and strategic plans, implementing ERP systems, completing business process reviews, completing complex multi-tier consolidated tax returns, development of strategic financial plans and business efficiency advising
- Earned CPA certification and managed and completed auditing engagements

ACADEMIC SERVICE

- Chair, AACSB Accreditation Committee (PBA), Authored Eligibility Application
- Secured Microsoft Academic Alliance Certification Program for PBA, SJFC

- PBA and SJFC were selected as Premier Microsoft Academic Alliance College or University, based on assessment of my personal credentials
- Microsoft Academic Alliance National Board Member
- Faculty Advisor – Accounting Club
- Faculty sponsor - SJFC PwC Tax Challenge
- Chair – Undergraduate Learning Assessment Committee
- Committee Member – On-Line Learning Task Force at PBA – 2017-Present
- Committee Member – On-Line Learning Task Force at SJFC School of Business - 2013
- Task Force Committee Member – Provost lead - Academic Planning Committee
- Sponsored six student groups for New York State and Rice Business Plan Competitions

HONORS, AWARDS and AFFILIATIONS

- Member of Microsoft Dynamics Academic Advisory Board
- Committee Chair - Microsoft Dynamics Academic Advisory Board
- Monroe County Outstanding Asset Builder Award -2009
- Microsoft Accounting Systems CAE - 100% recognition (Exceeded 100% Microsoft Goal Targets)
- Outstanding Value Added Reseller 1996-2003
- Microsoft Outstanding Customer Service Award – 2005-2006
- Certified CIS – Microsoft Business Solutions 1996-2008
- Honoree: Beta Alpha Psi – International Accounting Honor Society Member
- Peer Selected: Beta Alpha Psi Chapter Vice President
- Honoree: Beta Gamma Sigma: The International Honor Society for Business
- Member of American Accounting Association

CERTIFICATIONS

- Certified Public Accountant – New York State
- Microsoft Business Solutions Certified Solution Partner
- Microsoft Business Solutions Financial and Software Certified Consultant
- Microsoft Business Solutions Distribution Software Certified Consultant
- FRx Consolidation and Budgeting Software Certified Consultant
- FRx Forecaster Software Certified Consultant
- Paramount eProcurement Software Certified Consultant
- Microsoft Solution Selling Certified / Value Added Reseller Certified/CAE Certified