

BURTON LOUIS OSTERWEIS
OSTERWEIS BUSINESS CONSULTING

27 Adams Street, Westborough, MA 01581 USA
(617) 817-7908 -osterweis@hotmail.com

PROFILE

Mr. Osterweis currently holds the role of Independent Solutions Consultant with 20+ years of experience in SAP applications. Multi-national management experience in Europe, Asia, and North America makes him uniquely qualified for **hands-on implementation** as well as product, project, and organizational management. He has held SAP positions of Senior Consultant, Customer Engagement Manager, Development Manager, and Applications Consultant. Prior to joining SAP, Mr. Osterweis held the position of Manager of Information Systems, along with various engineering positions.

**Professional
EXPERIENCE**

INDEPENDENT CONSULTANT May 2005 - Present
Osterweis Business Consulting: Scoping, Staffing, Hands-on config., Project Mngt

Consultant Director - Investment Holding Firm, Massachusetts Jan 2023 – Present

- Financial Planning – prototype & support of planning systems
- Financial Statement Reporting & Analysis – consolidation of legal entities
- Portfolio Management – Financial solvency & Profitability Analysis, consumption of quarterly statements

Sr. Consultant & Architect – SAP BPC, SAC, GR, S/4HANA, BI

- High-tech client - Florida Oct 2024 – Nov 2024
 - BPC Consolidations to Group Reporting - Assessment & Strategy
- Government client - Canada Jan 2024 – Mar 2024
 - Public Budget Formulation to SAC transition & Group Reporting: Design, Architecture & Strategy

Lazard, NY, NY (*3rd & 4th engagements with client*) Apr 2021 – Dec 2022

- SAP Architect, Project Manager & Tech Consultant:
Full scope & design, management: Budget-Forecast system
- S/4-HANA 1909 BPC Planning, Eclipse, Analysis for Office, ABAP debugger
- Lead Architect & Project Manager & prototype configuration; user-exits, VB
- Gathered requirements, designed architecture & functionality: financial planning
- Prototype solutions, hands-on configuration of solution prototypes

Advanced Energy, Denver, CO Oct 2020 – Mar 2021

- SAC Architect: Full scope & design of Budget & Forecasting System in SAP Analytics Cloud (SAC) Client requirements to **SAC** architecture
- Gathered requirements, developed architecture for SAC full solution
- SAC Planning and SAC Reporting including multi-currency including models & stories for: CapEx, Op-Ex, HR, Revenue & Cost, Financial Statements
 - Headcount by Cost Center planning input with summarized reporting by legal entity
 - Operational Expense breakout reports for Non-standard costs and cost center expenses
 - Expense integration to income statement
 - Allocations from/to cost centers
 - Balance Sheet and Income Statement planning by Cost Center & Version – consolidated reporting by legal entity
 - Capital Expense planning by Cost Center with aggregated reporting by legal entity
 - Depreciation roll into income statement
 - Capital Expense planning aggregation by legal entity

- Data actions and interfaces from SAP BW, both Analysis for Office & Analytics Cloud add-in; Drill-thru reporting, planning cell locking
- Management of development roll-outs (transports) & off-shore dev staff
- **SAC Advanced Topics certified** – top 5% of class
- SAC credentials: <https://open.sap.com/verify/xodam-nugip-kucop-devas-fypav>

Horb-am-Main Spirits Co. LLC, MA Jan 2020 – Feb 2020

- **SAC Reporting Prototype** – creation of models and story for retail sales reporting
- Data actions & predictive analytics
- Planning with SAP Analytics Cloud (**SAC**) certified
- SAC credentials: <https://open.sap.com/verify/xehoc-pihur-fytug-casez-rehop>

Lazard, NY, NY (*2nd engagement with client*) Feb 2019 – Oct 2020

Investment Bank, NY, NY Oct 2017 – Dec 2018

- Management Reporting & Planning
- Full scope & design of Budget & Forecasting System in S4HANA BPC 1610 SP2
- Creation of composite provider, ADSO for planning and reporting
- FOX code of planning functions for derivations, translations, FX conversion
- Creation of Analysis for Office workbooks with VB code and use of SAP's suite of VB API's
- Creation Business Explorer (“BEx”) input-queries for use in AfO workbooks,
- Creation of HANA calc views
- Creation of custom ABAP class for user-exit data slice solution, involving DSO, input query, workbook
- Creation of user-exit formulae variables via CMOD and BADI solutions to compute ‘annualization’ of actuals data, perform planning filter restrictions, etc.
- ABAP function modules to write data directly to consolidations table ACDOCC
- Managed off-shore development staff
- Created BEx for BPC Workstatus data locking
- Created planning Function to load data from flatfile

Anika Therapeutics, MA Apr 2018 – Oct 2018

- Full Budget & Forecasting S4 HANA BPC 1610 SP2 including standard delivered workbooks, Cost Center, Stock Option, payroll, planning

Importer & Distributor: Horb-am-Main Spirits Co. LLC Jul 2017 – Aug 2017

- Awarded Massachusetts wholesaler's license

W.R. Grace: Multi-national building material conglomerate Jan 2017 – Jun 2017

- Business Warehouse design & configuration to support Daily Executive scorecard. DTP, trfn, APDs, ABAP routines, open hubs, BPC extracts, BPC input screens, process chains, recursive ABAP navigate cost-ctr hierarchy, etc.

Raytheon – Fortune 500 Feb 2014 – Dec 2016

- **Fourth consulting engagement** with this client – full design & implementation of Financial Planning System, **\$20+ Billion annual plan, BPC-Embedded/IP** solution. Analysis for Office, BW Netweaver on Hana, P&L and Cash planning. In addition to hands-on configuration of Analysis input-queries, planning levels, planning functions, BADI code, ABAP, VBA, FOX, functions, user-exit variables, info-provider creation, record locking design, also had project management responsibilities. Acted as lead technical consultant, and architect, sold vision to executive sponsors to fund project, created project plan, vetted 3rd party consultants, task management, interacted with SAP development for OSS note creation, issue resolution.

EMC – Fortune 500. August 2011 – Jan 2014

- **Second consulting engagement** with this client – Complete Design & Support of large scale SAP Business Warehouse architecture. Implementation of std & custom extraction from ECC, info-cube, data-store obj, reporting BEx, process chain, ABAP code, BPC, Webi, HANA, multi-nat'l high-tech mfg firm. Also acted as lead BW resource, created scope and architecture based on business requirements, created project plan, guided on-shore and off-shore development tasks. daily calls with off-shore team. Went live on-time, on-budget.

Raytheon – Fortune 500 June 2010 – July 2011

- **Third consulting engagement** with this client – design & full support of SAP Business Warehouse architecture. Visual Composer applications.

EMC - Fortune 500 Sept 2008 – May 2010

- SAP solution design, creation of training material, BW architecture design, integration with EMC solutions. Creation of custom extractors written in ABAP on R/3 to bring data into BW. In Netweaver BW 7.0, creation ODS's, info-cubes, DTPs, transformations, to extract large volumes of FI, SD, FI plan, data to BW system, creation of process chains to facilitate loads, creation of queries and multi-providers. Also, activation, use, and modifications to standard delivered BW content to support FI, SD processes, etc.

Burton Snowboards August 2009 – Jan 2010

- BI 7.0 creation of multiple custom extractors written in ABAP to pull financial data from FI & CO-PA into BW. Creation of info-cubes, multi-provider, DTP, transformations, tables, as needed to receive data, queries on multi-provider, retraction of data back to CO-PA. Customization and support of CO-PA.

Alexion Pharma April 2009 – July 2009

- System design: BI 7.0, Netweaver, Visual Composer, BOBJ tools

Barber Foods June 2007 – Nov 2008

- Complete design, scoping, staffing, management, & support of BW & BPS systems: BI 7.0, Netweaver, Visual Composer, Web Application Builder; creation of queries, planning screen, all BI objects: ODS, cubes, multi-providers. Process chains, DTPs, transformations, ABAP and FOX programming, IP.

Mass Mutual Financial. \$100B AssetsUnderMngt August 2006 – June 2007

- Significant Enhancements to and support of Planning systems (General Expenses, Salary Planning, Fixed Assets, Full Financial Planning (~200 users)
- BW/BI solution creation: Netweaver 2004S platform, DTP's, Transformations, ABAP derivations & lookups, cubes, multi-providers, etc.

Raytheon May 2005 – August 2006

Raytheon (2nd engagement) June 2007 – June 2008

- Support & Development of BW & BPS for Financial Stmt & Project Planning
- BW Performance & Architecture Improvement (ver.3.2, ver.3.5, 70 Netweaver)
- Cube, Multi, Modeling, Comm. Strct, Compression, Aggr, Extracts, etc.
- Daily support of planning system for \$16 Billion in plan, \$20B actual revenue
- Development, Support, Training with Remote Business Segments nationwide
- Support of R/3 nightly loads to BW then to BPS with presentation thru Portal

SENIOR CONSULTANT May 2003 – May 2005

SAP America, Waltham, MA – Senior Consultant specializing in SEM-BPS & BW

- Bell Labs Canada – 2 mo.; SEM prototype, pre-sales success
- DuPont - BPS/BW RFP response team lead, pre-sales success

- Raytheon – BPS – 1 mo; SEM performance analysis & recommendation
- J&J Pharmaceuticals– 9 mo.; SEM team lead, hands on configuration; Performed scoping, design, implementation, management, support of solution
- NASA – 5 mo.; SEM team lead, NASA letter of recommendation, managed SEM, BW and ABAP staff, high level solution of BPS configuration issues.
- Tweeter – 6 mo.; SEM & BW hands-on configuration; Performed scoping, design, implementation, management, and support of solution, BW 3.5
- Boston Scientific – pre-sales engagement project overview, staffing, timeline, scope – BW&BPS

CUSTOMER ENGAGEMENT MANAGER November 2000 – May 2003
 SAP America, Waltham, MA - Consulting Manager working closely with customers and partners within the Consumer Products sector to ensure the overall success of the implementation of SAP solutions and business processes, and make significant contribution to the customer relationship. Responsibility for team deployment and execution consistent with the Virtual Account Team Mapping, and play a significant role in the execution of the Customer Engagement Lifecycle (CEL) – Multi-million dollar consulting revenue quota per year. Customer Accounts include: Gillette, Osram-Sylvania, Mott’s, Perrier, Bose, and The Boston Beer Company, among others.

Responsibilities include:

- Assisting account team as needed in developing, communicating, and driving effective implementation strategies that are based on valid, customer-specific value propositions.
- Developing and communicating effective implementation strategies with the virtual account team.
- Positioning SAP’s implementation framework and methodologies & resources
- Facilitating customer satisfaction by appropriate escalation of issues leading to resolution of problems.
- Achieving successful management of customer implementation projects through the effective delegation of responsibilities to consultants and the development of effective project guidelines and plans.
- Ensuring success of the total customer relationship
- Team Improvement Support and providing leadership as needed for all SAP promotions and events in the territory, including but not limited to: SAPPHIRE, Industry Solution Days, executive events, and internal training workshops.
- Establishing and fostering a culture that will be conducive to ongoing coaching and account strategy sessions with Global Support Manager, Project Consultants, and Account Executive, in which they can learn and grow through adopting shared best practices.
- Administrative Management by providing direction to the assigned team regarding consulting and services policies and procedures, with a specific focus on virtual account team integration and the deployment of CEL.
- Ensuring compliance with all SAP personnel, services, pricing, contract policies.
- Maintaining accurate, timely, and documented pipelines, forecasts of opportunities, and communication of such to SAP management.
- Involvement in customer issues requiring resolution, including invoices, disputes, and other matters requiring field services leadership and management.

DEVELOPMENT MANAGER March 1999 – November 2000
 SAP Labs India, Bangalore, India – Managed teams of software developers (40 ppl.) responsible for: solving *Year2000* problems, creating software for Apparel & Footwear (‘AFS’) industry, and assisting in Strategic Development Projects (‘SDP’). Responsible for tripling the size of AFS & SDP teams in India. Managed ASD (Telstra marketplace) & IBU Automotive team also (Spare parts marketplace). Acted as Project Manager for the event titled: SAP Technical Summit 2000.

APPLICATIONS CONSULTANT

July 1996 – March 1999

SAP America, Waltham, MA - Consulting on configuration of financial and workflow systems. Profitability analysis, financial reporting, and information flow for approximately 30 clients including: Colgate Oral Pharmaceuticals, GTECH Corp., Schneider Automation, Northrop-Grumman, IBM, Polaroid, Kodak, etc.
 **SEE ATTACHED LIST FOR ALL ENGAGEMENTS

MANAGER of INFORMATION SYSTEMS

March 1995 - July 1996

Computer Identic Corporation, Canton, MA - Maintain INFORMIX, UNIX, TCP/IP, NOVELL on Ethernet, WFW and Starnode networks for data collection, file transfer and data storage. Financial & technical analysis of Internet and other projects. Manage consultants and co-op student. Position reports to CFO.

Awarded 1/4 million dollars from board of directors for new Enterprise Information System, involving MRP and financials. Analysis and selection of software vendors including Dataworks, Fourth Shift, Abacus, Avalon, Symix, etc. Fourth Shift software selected, true client/server architecture over NOVELL 3.11. Implementation to cover subsidiaries in Germany, France, U.K., and U.S. corporate office. Managed contracts binding Fourth Shift Inc. as reseller of Computer Identic barcode scanners and data collection terminals. Contracts included discounts, OEM rights, warranties, support, etc.

Configured and managed Internet connection through SCO Unix gateway running SLIP to TIAC in Cambridge. POP3 server running on SCO box with Microsoft Exchange clients. Also responsible for Microsoft post office, ftp, and world wide web sites. Responsible for growing NOVELL 3.11 network to 80 users. Running LSL, NE2000, IPXODI, NETX protocol suites with Microsoft TCP/IP running above. Installed 40+ network cards, workstations running WFW and Win95. Novell 3.11 syscon, printcon and user setup.

NETWORKING & MODULARITY ENGINEER

May 1994 - March 1995

Computer Identic Corporation, Canton, MA - Wrote software in "C" to final test new bar code scanning terminal working closely with R&D engineers through development process. Managed electronic bulletin board system, performed training.

APPLICATIONS SUPPORT ENGINEER

December 1993 - May 1994

Computer Identic Corporation, Canton, MA - A leading manufacturer of high quality bar code data collection solutions. Duties included the design, installation, instruction, and support of sophisticated software, hardware, and systems applications, emphasis on customer support and software training.

EMI COMPLIANCE ENGINEER

September 1990 - May 1991

Dash, Strauss & Goodhue, Inc., Boxborough, MA - "Inc. 500" corp. - 700% growth in 4 years. Performed testing and modifications on electronic devices for compliance with FCC part 15 requirements. Modifications to reduce electromagnetic interference performed at prototype level.

JUNIOR MANUFACTURING ENGINEER

May 1987 - January 1988

Perkin-Elmer Corporation, Instrument Group, Norwalk, CT - "Fortune 500" corp. Co-op student position. Created software in C and QuickBasic for final test procedures of new instrument for spectroscopy. Developed DBase III+ applications.

EDUCATION

The University of Massachusetts, Amherst, Massachusetts

Master of Business Administration, May 1993 (Concentration: Finance)

The University of Connecticut, Storrs, Connecticut

Bachelor of Science in Electrical Engineering, May 1990 (Conc.: Instrumentation)

Choate Rosemary Hall, Wallingford, Connecticut, 1985

HONORS

Dean's List School of Engineering: Spring 1988, Spring 1989, Fall 1989,
Upper Division G.P.A. 3.283
Full tuition waiver and stipend: September 1992 - May 1993

**TEACHING
EXPERIENCE**

CHEMISTRY & PHYSICS TEACHER Summer 1991, 1992
Cheshire Academy, Cheshire, CT
Taught chemistry and physics to international high school students.
Conducted laboratory experiments. Intensive 6 week program.

TUTOR February 1989 - May 1990
University of Connecticut Minority Pre-Engineering Program, Storrs, CT
Guidance of middle school children in problem solving & engineering projects.

**PERSONAL
EXPERIENCE**

Have traveled to: India 3/95,3/99-10/00, Greece 3/93, England 3/93, Jamaica 3/94,
Germany 6/87,8-9/99,12/99,2/00, 4/00,6/00,7/00,8/00,6/02, 1/05, 11/14, 7/18
Barbados 3/87,3/88,3/90,2/98, Iceland 6/87, Switzerland 6/87,6/02 Luxembourg
6/87, Australia 3-4/00, Singapore 6/00, Italy 6/02,Canadian work permit 8/03-11/03,
Bermuda 2/08, 8/16, Aruba 4/14, Austria 6/18, 6/22, Azores 7/19, Germany 7/21

Founded: The Osterweis Corporation, August, 1995. The S-corporation is a holding
and investment firm whose primary business activities include portfolio
management, real estate holding.

Founded: Osterweis Estates, LLC, August 2003. A Delaware series LLC, where the
series are the beneficiaries of reverse realty trusts. The trusts own rental properties
in the greater Boston area.

Founded & Manage: Henry M. Osterweis Charitable Memorial Fund since 2009

Joined: Atlas Capital Partners, L.P., May 2006. An investment partnership in
sustainable energy technologies. The partnership also makes charitable donations to
The Prometheus Institute, a not-for-profit org, with primary objective to accelerate
the deployment of socially beneficial sustainable technologies, including those of
energy, water, food, by educating industry participants, advocates and policymakers
about their benefits.

Joined: Siloam Lodge, Westborough 2011, officer position held for 4 years

Awarded: President's Award Exemplary Service, Westboro Cmty. Land Trust 6/17

Participated in: PIPE offering publically traded Hy-Drive Technologies 6/2010

Filed 13D with SEC: Acquired 5% stake in DLHC in 2015

Passion: For playing Jazz, Blues, and Ragtime on old pianos