

## Professional Profile

### Jerry Via - CPA, MBA

Managing Director - Houston

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Jerry Via is a strategic and operational consultant. He spent over 9 years in management consulting with the global consultancies PricewaterhouseCoopers, BearingPoint (formerly KPMG Consulting) and A.T. Kearney, where he led M&A, strategic and operational consulting engagements with clients located throughout North America, Europe, Australia and the Caribbean.

He has experience in M&A due diligence, post-merger integrations, business process innovation, and organizational redesign. Mr. Via has also held senior financial and strategy positions with Whitney Information, Sprint Communications, and MCI Communications.

#### HIGHLIGHTS

**Merger and Acquisitions:** Led teams over an 18-month period to develop and implement a strategic planning process for a global \$20 billion business process and information technology outsourcing company. Major areas of focus included financial services, healthcare, and retail. He participated in due diligence on several target acquisitions and was also engaged in the post-merger integration effort for several key acquisitions.

**Acquisition and Alliance Growth Strategies:** Experienced in assisting companies screen acquisition opportunities, design due diligence processes, and create strategic alliances. Led a team that developed the corporate strategic plan for a company headquartered in the Caribbean. He identified criteria for potential acquisitions, evaluated potential acquisition targets, and worked jointly with client personnel to integrate several new acquisitions.

**Financial and Operational Improvement:** Proven expertise in implementing effective financial and operational reporting, improvement processes, and transformational change.

**Strategic and Operational Planning and Analysis:** Demonstrated ability to design and implement strategic planning processes and turn-around strategies.

#### EXPERIENCE

##### WHITNEY INFORMATION NETWORK - Vice President of Corporate Strategy and Investor Relations

Whitney Information Network is a publicly held corporation based in Southwest Florida with additional locations in Canada and the UK.



Responsible for continually refreshing and articulating the company's strategy, identifying new business opportunities, and providing ongoing competitive analysis and market insights.

Major accomplishments included: Developed a new three-year strategic plan for the company that was presented to the Board of Directors. Identified new growth areas for the company to pursue.

## **G. WATTS CONSULTING - Principal**

### **EDS CORPORATE STRATEGY GROUP**

Led a major initiative to financially and operationally turn around EDS' largest Information Technology infrastructure outsourcing contract, the Navy and Marine Corps Intranet, with annual revenues in excess of \$1 billion and a total contract value in excess of \$9 billion.

### **NEXTEL**

Developed key performance indicators and benchmark metrics that Nextel Vice Presidents could use in the areas of Finance & Accounting, Tax, Human Resources and Supply Chain to measure progress towards business process Best-In-Class performance.

## **BEARING POINT (formerly KPMG Consulting) - Senior Manager/Director - Strategy**

Recruited to expand the strategy practice at BearingPoint. Focus on marketing strategy, business case development, financial process improvement and re-design, and financial and strategic planning. Major accomplishments included:

Led a team that developed the corporate strategic plan for a company headquartered in the Caribbean. He identified criteria for potential acquisitions, evaluated potential acquisition targets, and worked jointly with client personnel to integrate several new acquisitions.

Examined the financial viability of a Canadian telecom for the company's lending syndicate. Led an extensive analysis of the telco's financial projections, strategic business plan, and current operating performance.

## **PRICEWATERHOUSECOOPERS CONSULTING - Principal - Strategy**

Focus on strategic and operating planning, marketing strategy, channel management, process improvement, and new product development. Sample engagements included:

Assisted an Australian IP-based telecommunications company in developing effective marketing and sales strategies to compete with the major incumbent telco. Developed the business requirements for a Business Support System in the areas of planning, supply chain, marketing, product development and customer care.

Led an e-Business opportunity evaluation that identified and quantified value creating e-business initiatives for six lines of business at a global company headquartered in Spain. The project required extensive financial analysis relative to key drivers of the business. Initiatives developed included enhanced sales and marketing capabilities.



## **A.T. KEARNEY, INC. - Senior Manager**

Focus on strategic planning, turnaround strategies, market entry and business case development in a wide variety of high-technology and financial industries, including information technology and outsourcing. Sample engagements included:

Led a team that developed a successful U.S. market entry strategy, strategic business plan, and core process designs for a subsidiary of a \$50 billion German energy provider. Developed and led a successful turnaround strategy for a troubled U.S. company recently acquired by the client. Participated in due diligence activities and post-merger integration relative to several client acquisitions.

Reduced operating costs by 20% for a Caribbean-based telecom by conducting an operational and organizational efficiency study that spanned 15 countries in the Caribbean. Recommendations were focused heavily in the areas of supply chain management and field service optimization.

Led teams over an 18-month period to develop and implement a strategic planning process for a global \$20 billion business process and information technology outsourcing company. Major areas of focus included financial services, healthcare, and retail. He participated in due diligence on several target acquisitions and was also engaged in the post-merger integration effort for several key acquisitions.

Assisted the world's largest satellite operator in developing a new competitive subsidiary to deliver Direct-To-Home video, video distribution, and satellite-delivered consumer multimedia and Internet services. Made frequent presentations to the governing oversight committee, which consisted of representatives from 20 countries.

## **CONSULTING**

Engaged as the Vice President of Product Management for a rapidly growing education company in Bonita Springs, Florida. Duties included streamlining the product development process. Negotiated contracts with software developers in India, Canada, and the USA to make enhancements to the Software-as-a-Service platform.

Developed improved marketing programs, identified potential acquisition targets and led financial and operational acquisition due diligence for an Internet retailer based in Orlando, Florida.

Assisted a healthcare provider in the greater Houston area to evaluate the financial and strategic benefits of moving forward with a "Concierge Medicine" alternative practice format.

## **EDUCATION / CERTIFICATIONS**

Master of Business Administration - The Fuqua School of Business - Duke University

Bachelor of Science - Accounting - The University of Maryland

Certification - CPA, State of Maryland