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West Hartford | CT

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## PROFILE

Accomplished and broadly skilled **Business Development** and **Global Corporate Strategy Professional** with a valuable complement of financial, legal and entrepreneurial expertise and nearly 20 years of experience helping companies grow revenue and expand market share through innovative M&A, partnerships and ventures. Expert at identifying, securing and closing multimillion-dollar deals across varied cultures (*on four continents*) and sectors (*Financial Services, Manufacturing and Mining/Construction*). Uniquely able to understand both the financial and legal impacts of complex, multi-phase transactions. A personable, nimble, visionary leader whose career has been distinguished by driving strategic change and who has earned a reputation as an expert negotiator and a trusted advisor.

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## SKILLS AND EXPERTISE

**Business Development** - initiation → close

**Problem Solving** - data analytics & design thinking

**Cross-Functional Leadership**

**Mergers & Acquisitions** - identification → execution

**Marketing Channel Strategy** for targeted penetration/reach

**Germanic Language Proficiency**

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## PROFESSIONAL EXPERIENCE

**JOHNSON CONTROLS INTERNATIONAL, PLC.**, Milwaukee, WI

2013 – 2016

*A multinational conglomerate headquartered in Cork, Ireland that produces automotive batteries, HVAC equipment and building security products and services. (Revenue: USD 30.7 billion)*

### **Executive Director, Mergers & Acquisitions, Strategy and Corporate Development**

- Managed all Mergers & Acquisitions for \$10 billion *Building Efficiency* business, while overseeing global inorganic strategy, including pipeline development and management, and transaction execution
- Played key role in negotiating JCI-Hitachi JV with \$2.8B in annual sales, and ADTI acquisition valued at \$1.6B
- Diversified company portfolio by executing \$2B in acquisitions; and led global, cross-functional teams in five M&A divestitures completed over an 18-month period
- Developed JCI's M&A corporate playbook of best practices in origination and execution of transactions
- Established a framework for transitional services agreements for the Hitachi joint venture (which became the company's blueprint) and was the point person for the streamlining and integrating all business operations (HR, IT, Production, Compliance, Finance etc.) to ensuring day one readiness post-closing
- Crystallized and drove JCI's IoT (Internet of Things) strategy leveraging the company's big data and buildings portfolio to attract key partners with strong IoT capability

**CATERPILLAR, INC.**, Milwaukee, WI

2010-2012

*A publicly traded corporation that designs, develops, engineers, manufactures and markets machinery, engines, financial products and insurance to customers via a worldwide dealer network. (Revenue: USD 38.5 billion)*

### **Director of Finance**

- Reduced cost over-runs for complex projects by developing an execution blueprint for the largest mining equipment project secured by the company
- Managed post-closing integration initiatives for the acquisition of Terex Mining, and supported the post-close strategy and integration blueprint for Bucyrus into Caterpillar
- Ensured that aggressive revenue and cost synergy targets were met by accurately identifying, analyzing and capturing key performance indicators

**ARCELORMITTAL, LTD.**, London, UK / Johannesburg, South Africa

2008-2010

*The largest steel producer in the world (Revenue: 68.3 billion EUR)*

### **General Manager, Mergers & Acquisitions (Africa)**

- Oversaw all facets of Merger & Acquisitions, including setting up a new team and defining vertical integration strategies across Southern Africa
- Identified acquisition targets and pursued resource-based opportunities, including *greenfield* and *brownfield* mining operations, and performed due diligence on potential acquisitions

- Secured and closed transactions worth \$450M over a two-year period

**BARCLAYS CAPITAL / ABSA CAPITAL LTD.**, Johannesburg, South Africa 2007-2008

*A multinational bank and financial services company headquartered in London (Revenue: 21.5 billion GBP)*

**Head of Client Planning & Strategy**

- Led a client-focused, high-performing team in identifying and securing new business opportunities while generating profitable revenue growth in key African markets
- Developed a blueprint for ABSA Capital (acquired by Barclays Capital) to execute a client growth strategy for African markets
- Facilitated the change management function to align ABSA Capital with Barclays Capital's international best practice approach to deal origination and execution

**SANSARA FINANCIAL SERVICES (Pty) LTD.**, Johannesburg, South Africa 2005-2007

*A boutique corporate and project finance advisory firm established by 4 investment bankers and sold to Macquarie Bank, Australia's preeminent Investment Bank at the time. (Macquarie Bank Assets Under Management: 481.7 billion AUD)*

**Founder and Director**

- Formed this new enterprise (with the three colleagues from HSBC/Andisa with funding from Andisa Capital) and successfully managed key elements of the launch: capital raising, branding, shareholder agreements and recruiting of staff
- Set strategic business goals for the overall firm, and ensured that they were met, with specific executive level oversight on the achievement of business development goals and deal execution
- Negotiated a profitable sale to Macquarie Bank which was looking to enter the growing African market

**ANDISA CAPITAL (Pty) LTD.**, Johannesburg, South Africa 2004-2005

*A boutique investment bank established by Standard Bank, one of Africa's top banks (Revenue: 8.6 billion USD)*

**Associate Director**

- Recruited (with three colleagues) out of HSBC to manage execution of complex transactions including: mergers, acquisitions, disposals, joint ventures, fairness reviews and capital-raising
- Led or supported over \$3.5B worth of transactions, and achieved an accelerated career track including two promotions in a single year (2005) in recognition of exceptional performance

**HSBC HOLDINGS, PLC**, London, UK / Johannesburg, South Africa 2000 -2004

*A multinational bank and financial services company headquartered in London (Revenue: 21.5 billion GBP)*

**Manager**

- Successfully completed HSBC's rigorous global, rotational Executive Management Training Program, while attending (and graduating from) law school
- Gained experience in securities, asset management, strategy & planning, corporate and project finance
- Advised on a variety of transactions including mergers, acquisitions, infrastructure financing, disposals, IPOs, joint ventures, strategic equity partnerships and capital raising

**EDUCATION AND CERTIFICATION**

**University of Virginia** - Darden School of Business - Certificate in Design Thinking for Innovation, 2017

**Cornell University** - Certificate in Data Analytics and Certificate in Business Strategy, 2017, 2013

**University of Witwatersrand**, South Africa – LLB (Juris Doctor equivalent), 2004

**University of Natal**, South Africa - Bachelor of Commerce, 1998

**OTHER EXPERIENCE**

**Change the Play**, New Haven, CT, **Entrepreneurship & Business Mentor** for Inner City Students 2017-present

**The Zen Collection**, West Hartford, CT, **Founding Principal/Executive Director** 2016-present  
 E-commerce venture that designs and markets children's apparel and a self-authored *Values* book series, to promote creativity and positive leadership in children across the globe

**Play Africa Children's Museum**, Johannesburg, South Africa, **Member, Board of Directors** 2014-present

**White Paper titled "Disruptive Energy Trends in the United States"** for Joy Global, Inc. (now a division of Komatsu Mining) resulting in the global diversification of the company's portfolio 2011