



Patrick Darsey
Business Analyst

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Summary of Experience and Qualifications

Patrick is a Business Analyst in the Strategy & Operations service area. He holds a Bachelor of Science in Industrial Engineering with a concentration in Economic Decision Analysis from the Georgia Institute of Technology.

Since joining Deloitte, Patrick has carried out a financial performance improvement analysis, personally creating and managing financial models responsible for over \$20M in savings. He also has strategy experience, completing a market and customer segmentation project for a health system desiring to become its own insurance provider. Patrick has also executed a corporate marketing assessment to identify any red flags that may create conflict if the client was to be acquired. In spring 2011, he conducted both design workshops and various analyses to drive global safety stock levels for one of the world's largest direct selling companies. Most recently, he designed and built financial models to calculate the profitability and market attractiveness of new health departments for 2 independent health systems.

Outside of Deloitte, he successfully led a team of 6 to develop a plan of action enabling a distribution warehouse to double its annual revenue of \$215M to \$430M within 3 years.

Patrick is well qualified in both financial and quantitative modeling. He is very proficient in Microsoft Excel, PowerPoint, Access, and Word. He is particularly interested in developing experiences in both the Pricing practice and the Financial Services industry.

Deloitte Experience

Industry: Health Care and Life Sciences

Service Area: Strategy and Operations

Service Line: Strategy

Role: Modeler, 1 month

Client Description: Client was twofold – a 357-bed New England based regional tertiary-care center seeking profitability in new areas, and a Mid West provider seeking a market assessment for potential partnerships.

Project Description: This project consisted of simultaneously building models for two clients. These models analyzed departmental profitability and simulated market attractiveness.

Accomplishments:

- Client #1: 357-bed New England based regional tertiary-care center
 - Owned development of two robust Microsoft Excel models to calculate:
 - The market opportunity (and sensitivity) of a female oncology services center
 - The profitability (and sensitivity) of building a new liver center
 - Interacted with client counterpart and additional Deloitte colleague to research and decide upon assumptions feeding the models
 - Created user-friendly dashboards for the client to toggle assumptions and see the bottom line impact, in terms of dollars and patients, real-time
 - Developed and distributed to client stand alone documentation explaining the mechanics, initial assumptions, and initial outcomes of each model
- Client #2: Mid West provider
 - Created analysis to determine market attractiveness (and sensitivity) of client's market to assess potential partnerships
 - Designed Microsoft Excel model to simulate potential scenarios where various hospitals partnered with one another
 - Calculated the impact on client's market of said scenarios, and gave high level thoughts around strategic impact on both client and its market
 - Developed and distributed to client stand alone documentation explaining the mechanics, initial assumptions, and initial outcomes of the model

Industry: Consumer and Industrial Products

Service Area: Strategy and Operations

Service Line: Manufacturing Operations – Supply Chain & Operations

Role: Technology Configuration, Data Analyst, Deliverable Development, 4 months

Client Description: Client was a \$9.3B, privately held global corporation offering products, business opportunities, manufacturing and logistics services in more than 80 countries worldwide. Deloitte was engaged to work with one of its business opportunities – one of the world's largest direct selling companies, with over 3M

independent business owners worldwide. This business opportunity offered more than 450 products in the areas of nutrition, home care, personal care, durables, and beauty.

Project Description: The safety stock levels at said opportunity had been manually optimized by planners based on the item's historical performance. The client's goal was to improve inventory by generating safety stock levels based on item and market demand and supply uncertainty, while at the same time maintaining high service levels. Deloitte was engaged to 1) host workshops to investigate and answer open questions around the design of the software, 2) manage the development, testing, and go-live of the model, and 3) eventually train and communicate to the appropriate stakeholders the impact of the project. Deloitte was to both do this for three specific markets and create a deployment plan for the rest of the world.

Accomplishments:

- Conducted 12 design workshops with Deloitte team, client counterparts, and client SMEs
- Owned functional unit testing of development objects (the model's code) by working with the client's IT project manager, business project manager, and developers
- Authored functional specifications for recommended changes to the current software design, as well as any new development objects created due to outcome of each design workshop
- Represented Deloitte as the only onsite practitioner for 1½ weeks during the down time between phases
- Trained replacement practitioner over a 3 week period in learnings/accomplishments from the previous phase, functional and integrated development object testing, and general client protocol (during the second phase only)

Industry: Financial Services

Service Area: Strategy and Operations

Service Line: Strategy

Role: Interviewer, 1 month

Client Description: With no branches and all transactions performed online, the client was the nation's largest direct bank, offering savings and checking accounts, investment and retirement funds, and home mortgages. Client boasts itself on being focused on increasing savings opportunities for its customers and is very concerned that its brand consistently portrays this mission at all times.

Project Description: Deloitte was engaged to perform an assessment of the client's marketing organization to determine current state and identify gap areas / areas for improvement by measuring against best practices. The engagement was carried out by an on-site team of 2 supported by a remote project leadership team of 2.

Accomplishments:

- Interviewed 25 marketing directors, gathering and compiling information / insights received
- Performed gap analysis by researching best practices and determining maturity of client against a 16 dimension marketing maturity model
- Grouped interview insights into 6 categories and created 6 initiatives for client to execute in order to fill gap areas and become a best practice organization

- Developed roadmap for each of the 6 initiatives, outlining the description, benefit and rationale, design parameters, execution activities, and expected duration

Industry: Health Care and Life Sciences

Service Area: Strategy and Operations

Service Line: Service Operations - Financial Performance Improvement, Business Case Development, and Implementation

Role: Data Analyst, 7 months

Client Description: A 450 bed health system composed of 2 main hospitals servicing the northwest Chicago suburbs.

Project Description: The purpose of the first phase of this project was to complete an assessment and identify potential savings if the client were to achieve top quartile compared to its local and national peers. The second phase consisted of developing business cases to achieve those savings, and the third phase consisted of implementing these business cases.

Accomplishments:

- Independently owned the two main financial models responsible for identifying over \$20M in potential savings in 3 main areas: administrative and clinical support, supply chain management, and clinical productivity / throughput
- Successfully prioritized, maintained and delivered results simultaneously for multiple work streams, including those for all shared services and clinical productivity teams (case management, supply chain, emergency department, operating room, imaging, post anesthesia care unit, etc.)
- Built the 7-step business case for surgical services
 - Conducted client interviews to validate and gain buy-in, identifying a cumulative \$1.7M in net annual impact after 2 year implementation process
 - Designed a staffing model that identified \$0.7M in excess PACU staffing costs
 - Analyzed the ongoing costs, benefits, capital investments, associated risks and potential mitigation plans needed to successfully execute the business case
 - Created a realization schedule for the financial benefit that identified quarterly savings after full implementation
- Designed the Initiative Database to document status of all (100+) initiatives to present to and review with client leadership during the final leadership retreat
- Integrated to the Initiative Database a model to monitor progress of initiative implementation against financial benefit realization schedules and to identify issues in need of escalation to the Steering Committee
- Created, and trained client to use, a dashboard that allowed for monitoring of implementation and realization schedules against the fiscal year budget

Industry: Health Care and Life Sciences

Service Area: Strategy and Operations

Service Line: Strategy

Role: Data analyst and researcher, 1 month

Client Description: A 7 hospital health system servicing the greater Detroit area.

Project Description: The purpose of this direct contracting analysis was to determine if the client could achieve its strategic initiative to offer insurance directly to its patients and local residents in order to decrease costs for the consumer and itself, thereby increasing its margin.

Accomplishments:

- Owned research behind the market and customer segmentation analyses, in addition to the analyses themselves
- Used data found in customer segmentation analysis to assist in creating an accretive volume model which indentified the contribution margin client would see if direct contract initiative was to be implemented
- Evaluated through the market segmentation analysis various alternatives and mitigation techniques to present to client leadership if direct contracting initiative was to be deemed infeasible, including becoming a center of excellence for both disease and case management
- Owned model that analyzed client's service lines to determine which were growing and leading the market; this model was the basis for which service lines client should have pursued in order to become a center of excellence
- Assisted in developing and editing all deliverables, including spreadsheets, databases, and presentations

Previous Experience

Industry: Consumer and Industrial Products

Service Area: Strategy and Operations

Service Line: Service Operations

Role: Team lead, 8 months

Client Description: The client is a manufacturer of premium baking ingredients (at the time the world's largest producer of icing, glazes, fruit filling, and dry mixes). In-store bakeries and foodservice sales compose its customer base. The company distributes internationally to over 25 countries.

Project Description: The client had seen little to no growth in an industry that had seen tremendous growth over the previous five years. In an effort to capitalize on potential growth, executive client leadership put a strategic initiative in place with the intention of doubling throughput over a three year period, with limited capital investment. The project focused on meeting and sustaining these growth targets.

Accomplishments:

- Analyzed and redesigned current warehouse layout, allowing client to double its current \$215M annual throughput/revenue level (product valued at \$1/pound)
- Extracted raw historical data from client software and performed analyses, ultimately designing a queuing theory model in Microsoft Excel to calculate present and future bottlenecks of 90,000 sq. ft. warehouse
- Proposed optimal labor schedules and inventory retrieval options for future throughput levels to achieve maximum efficiency and labor utilization for all 26 warehouse employees
- Calculated payback period to verify that the warehouse redesign and proposed schedules were sound investments
- Interviewed warehouse manager, TPM coordinator, and warehouse employees
- Presented results to client leadership

Industry: Financial Services

Service Area: Strategy and Operations

Service Line: Information Management

Role: Data collection, 5 months

Client Description: Fortune 500 firm specializing in brokerage, investment banking, and asset management.

Project Description: Historically specializing in alternative investments for high profile individuals, the client created an initiative to enter into wealth sharing partnerships with medium size institutional investment firms (\$100M to \$500M assets under management). The focus of the project was to research, categorize, and if need be, meet with the personnel of these institutional investment firms.

Accomplishments:

- Researched 500+ institutional investment firms (trusts, foundations, pension funds, endowments, etc.) in the Southeast U.S. to expand current clientele
- Organized potential partnership firms in Microsoft Excel database

Internal Experience

- Served as Local Office Champion for the ABAAC (2011)
 - The Atlanta Business Analyst Action Committee is a steering committee tasked with overall BA/C community management and development
 - Elected as the General Council position
- Developing Advanced Microsoft Excel Course (2011)
 - Project based application of advanced modeling techniques through actual model development
 - The course is instructor led and practitioners will construct a model from ideation through to making it operational
 - In the course practitioners will learn how to: 1) incorporate/consolidate various forms of raw data as well cleanse the data, 2) define and structure assumptions as well as manage variables centrally, 3) structure analyses and calculations, 4) structure a dynamic model that is sustainable and repeatable, 5) employ MS Excel functionality in an advanced setting, 6) structure outputs/results in a manner stakeholders can clearly follow, 7) create dynamic visualizations in a dashboard for quick manipulations, what-if analyses, and sensitivity analyses
- Served as BA Week 1 peer coach (1 of 3 BA/Cs chosen) for incoming BA class (2011)
- Taught the Practical Analytics Learning Series (PALS) (2010 and 2011)
 - 5 part Microsoft Excel course for the Atlanta BA/C/M community
 - Cleaning and Preparing Data
 - Fundamental Formulas
 - Workbook Hygiene
 - A Finished Product
 - Macros and VBA
- Enrolled and took analytical electives
 - Training the Street: 8 hour advanced financial modeling course (2010 and 2011)
 - Foundations of Microsoft Access (2011)

System Experience

Microsoft Office: Excel (expert), MapPoint (expert), PowerPoint (expert), Word (expert), Access (intermediate), Project (training only), Visio (training only)

Development Tools / Languages: SQL (introduction to databases), HTML/PHP (project experience), Java (training only), MATLAB (computing for engineers)

Software / Products: Solucient ActionOI (advanced), Adobe Acrobat (expert), Arena Simulation (project experience), Monarch Pro (project experience), MiniTab (project experience)

Hardware / Operating Systems: PC Hardware (expert), Windows Vista (expert), Windows XP (expert)

Education

Bachelor of Science in Industrial Engineering, Economic Decision Analysis
Georgia Institute of Technology, High Honors

Deloitte References

- Client work
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