

H. Baird Lobree

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Summary

Senior Executive Management Consultant with over thirty-five years of professional experience. Create & execute business growth strategy, select & integrate information technology, implement management reporting, analytics, internal & environmental controls. Proven ability to assess multi-national business needs, design business models, develop operational action plans, achieve board & executive management consensus, execute on strategic solutions, technology infrastructure in numerous industries. Known for troubled company leadership, project and information technology turnarounds. Expert witness for complex business, systems, cybersecurity & environmental technology matters. Professional speaker and facilitator; able to work within international organizations to examine issues, create strategy, identify problems, implement solutions & achieve results. See attached summary of representative industries, example project & expert witness experience.

Professional Experience

The Lobree Corporation

June 2010 - present

President

TLC is a management & technology consulting firm that offers senior executive, owner and Board support. Lobree specializes in business growth strategy, business results improvement, troubled company rehabilitation, information & environmental technology planning, selection, management & remediation. www.lobree.com

Auxis, Inc.

April 1997 - May 2010

President, Chief Executive Officer, Founder

Auxis is a management & information technology consulting and outsourcing firm. www.auxis.com

Cap Gemini / Gemini Consulting, South Florida

November 1995 - April 1997

Principal

Produced significant new business and delivery management for worldwide management & technology consulting firm. Developed new relationships with target executive management. Sourced appropriate internal & external vendor solutions for clients' changing business needs. Led and managed complex projects from initial meetings, proposal development, contract negotiations, project planning, execution, Board of Directors reporting.

Accenture / Andersen LLP, Miami, Florida

1994 - November 1995

Liaison Manager

Produced significant business for Accenture & Andersen LLP through advanced practice development skills, senior executive relationship management & troubleshooting. Reported to the two Managing Partners for Accenture & Andersen in Florida. Led and managed many complex business/information technology projects.

Arthur Andersen LLP

1991-1994

Florida Computer Risk Management Manager

Established Florida & Caribbean information technology audit & cybersecurity practice. Developed and led firmwide telecom information technology team by designing, executing and teaching numerous new cyber services. Responsible for practice planning, intellectual property development, project delivery, staffing, training, financial management & reporting.

Financial Audit Manager

Began as a financial audit staff, progressed to manager on a wide variety of clients in many industries. Member of Computer Audit Specialty Team. Performed all facets of financial auditing from fieldwork to financial statement preparation, S.E.C. reporting.

Education

1983-1986	Florida State University, FL	Bachelor of Science, Accounting – Undergraduate and graduate study of accounting & information systems
1981-1983	Tulane University, LA	A. B. Freeman College of Business - Undergraduate study of business and liberal arts

Representative Industry & Project Experience

Extensive industry experience & knowledge of financial services, air, sea & land transportation/travel/multi-modal logistics, consumer & industrial products, wholesale & retail distribution, food & beverage, entertainment, pharmaceutical /life sciences, telecom, utilities, real estate, agriculture, high-tech manufacturing, information technology/software, physical & cybersecurity, defense, gaming and government. Baird has worked in over 500 businesses & technology environments throughout his career. Project examples include;

Growth Strategy Planning & Execution

- Led client's complex business growth & deal teams to model, project manage execution, develop proposals for multi-million to multi-billion dollar pursuits to produce highly successful results.
- Led growth strategy planning for \$750M agricultural & food concern to double EBIT in 36 months.
- Incubated & provided professional services to SBA backed SBIC mezzanine fund with over \$500M invested.
- Led international central bank's effort to plan and design new financial service offerings to serve country.
- Prepared \$2B food and beverage distribution concept for spinoff from parent. Led development of business plan, operating model and systems for standalone operations.
- Led B2B Internet nursery/landscaping company business infrastructure design and implementation project targeting \$80B+ industry. Moved company from concept to launch in eight months.
- Designed numerous business operating & financial models to future project operations with complex & different processes/business models, subsidiaries, JVs and complex vendor/business partner agreements. Extremely high value-added capability to design, negotiate better business partner & IT deal structure, terms and complex operational agreements.
- Assisted or led numerous efforts to address issues of material & aggressive activist investors.

Business Process & Technology Planning / Business Infrastructure Design

- Architected spa concessionaire's retail point of sales/service and inventory control information technology. Specified demand & supply chain infrastructure for operations throughout 100+ remote spas worldwide. Project yielded over 300 basis point permanent improvement in portfolio-wide margins.
- Designed the strategic retail business infrastructure for a \$1B fashion retailer. Systems included demand chain, merchandising, replenishment, allocation, inventory and point-of-sale processes and technologies.
- Designed the future 'To-Be' Enterprise Application Architecture for an international fast-food conglomerate. Architecture included restaurant point-of-sale and back-of-house systems to regional marketing systems, SAP financials, groupware, intranet, workflow, business intelligence & data warehousing technologies.
- Re-designed and implemented point-of-sale systems, value-added network polling, lockbox, credit card settlement and sales reconciliation processes for an international retailer. Project yielded 40% personnel reduction and shortened close by 15 days.
- Prepared a future information technology blueprint for an international pharmaceutical conglomerate.

- Specified the technology platform, communications systems, call detail reporting, security and controls for a leading in-bound telemarketing firm.
- Designed and managed the development of a store opening and daily operations procedures manual for an international video retailer. Procedures were implemented at over 3,000 stores worldwide.

Revenue Enhancements / Operational Improvements

- Built 2nd stage “yield management” function for a large transportation company to maximize revenue and reduce operating expenses which yielded hundreds of basis points of margin improvement.
- Designed container cube space, racking and weight optimization program for short haul transportation, yard management, cross dock, demurrage & transportation revenue enhancement.
- Performed a mobile telephone switch revenue recognition project at a major cellular communications company. Developed revenue assurance procedures that yielded \$28M+ additional annual revenue.
- Re-engineered the business processes for the South and Central American division of an international food and beverage conglomerate. Developed detailed process and technology “to-be” plans for a shared services center to handle customer orders, distribution and financial processes.
- Re-built the order, billing, collections and customer service systems for a large catalog retailer. New revenues and retention of previously lost customers yielded \$50M+ additional annual revenue.
- Helped numerous companies specify, design, write algorithms, artificial intelligence, analytics to; cost/price products & services, plan merchandising assortments, operating, general & administrative expenses.

Project “Bailouts” / Troubleshooting / Turnarounds

- Resurrected a catastrophic \$18M Oracle financial systems project for a \$3B food distribution company.
- Led public pharmaceutical workout team that resulted in 97% capital return to shared national credit.
- Assisted multinational consumer products distributor in successful plaintiff action regarding \$4M failed Siebel Customer Relationship Management system implementation.
- Acted as an 8 month interim CFO/CIO for a private bank. Took charge of 25 person accounting & IT department after serious management fraud and Fed seizure.
- Led the resurrection of a failed \$30M Oracle systems project for a global petroleum financial services firm.
- Advise many commercial/investment bankers and equity owners on troubled assets. Successfully migrated many to reasonably managed normal credit or asset-backed loan facilities.

Risk Analysis / Technology Control / Due Diligence / Expert Witness

- Helped numerous Fortune 1000 and hundreds of middle-market companies to specify, select, procure, manage, contractually control, budget, plan and restructure business technology spending.
- Business case justified over \$350M in total IT capital projects spending, well over \$50B in business CAPEX.
- Identified and negotiated \$35M purchase price reduction in process & systems due-diligence work in the acquisition of a large financial institution.
- Evaluated power management and billing controls at an international electric utility conglomerate.
- Led State Public Service Commission engaged investigation, resolution and repair of \$25M+ malfeasance.
- Designed and delivered training for the Federal Financial Institutions Information Systems Examination Council on automated teller machine network operations, processes, encryption security & controls.
- Performed hundreds of general technology environment and detailed application control reviews.
- Aided 30+ public companies in successful compliance with Section 404 of the Sarbanes-Oxley Act.
- Advised numerous attorneys, equity owners & Boards regarding complex business & technology disputes.
- Served as prevailing expert witness in numerous plaintiffs & defendant lawsuits. See following example schedule of matters.

Associations, Memberships & Board Seats

Baird has been a member of the Association for Corporate Growth, National Association of Corporate Directors, Council of Logistics Management, International Bankers Association, Telecommunications Industry Association and the Institute of Management Accountants. Baird was a three term President of the Information Systems Audit and Control Association, South Florida Chapter. Baird was a former Certified Information Systems Auditor. Baird has been a member or advisor to various profit & not-for-profit Boards of Directors serving in various financial, operations, compensation, audit committee, special projects & investigation roles.

Professional Papers & Presentations

Baird has addressed various federal regulators & agencies in the Washington, D.C., innumerable corporate management & Board of Directors audiences, the Florida Institute of Certified Public Accountants, the Information Systems Audit & Control Association and numerous academic organizations. Baird is often sought as an expert witness; he has been deposed and written reports in a variety of complex business, information technology and cybersecurity matters. Representative papers, methods, presentations, practice aids, practice literature and training sessions include;

1. How to Achieve Board Confidence with Your Business Growth Strategy - November 2017
2. Best Practices for Information Technology Spend Management - October 2016
3. What Boards Can Do to Address Cybersecurity Risks - March 2016
4. E-Business & Cloud-Based Application Infrastructure Selection/Development/Deployment - March 2014.
5. Margin Controls Should Be Your Number One Business Control - September 2008
6. Customer, Product, Service & Vendor Rationalization; Maximizing Your Margins - June 2009.
7. Treasury Management Best Practices, Processes & Tools - March 2007.
8. Current Challenges in Financial Management Processes & Technology - October 2005.
9. Sarbanes Oxley Section 404 - Hard Lessons Learned - May 2005.
10. A Senior Executive's Guide to Using the Power of the Internet - May 2000.
11. Business & Career Opportunity in the Internet Era - April 2000.
12. Business Technology Ground Rules for Success - November 1999.
13. Emerging Technologies Beyond 2010 - October 1999.
14. Enterprise Application Architecture Guidelines - Emerging Technologies practice aid - November 1996.
15. Inventing Your Future: The Effects of Trends & Changes in Information Technology on Business, The Accounting Profession & You - February 1995.
16. Designing Client/Server Applications and Processes (joint publication & presentation with the MIS Institute/Frank Lyons, President, Entellus Technology, Inc.) - February 1994.
17. Charge-out & Allocation Systems: Managing Your Information Capital - September 1993.
18. Mobile Telephone Information Systems (Andersen telecom industry competence document) - April 1993.
19. Cellular Telephone Industry Information Systems Risks and Controls (Andersen telecom industry competence document) - April 1992.
20. Integrating Logical, Physical Security & Business Controls Administration (Andersen CRM governance aid to senior management and Boards)
21. Application Program Change Control (Andersen Computer Risk Management software practice aid) - February 1992.
22. Automated Teller Machine Network Operations, Processes, Control & Security, Federal Financial Institutions Information Systems Examination Council, Washington, D.C. - October 1991.

		H. Baird Lobree Expert Witness/ Deposition Experience			
Case name	Case #	Attorney represented	Plaintiff/ Defendant	Dispute Description	Date
Mercury Air Group, Inc., v. Rene Perez	00-CIV-2975 HB	Gilbride, Heller & Brown, P.A.- Dyanne Feinberg, Esq.	D	Aviation Transportation software Co. contract matter	Jan-01
General Roofing Service, Inc. v. Riverside Holdings, Inc. a/k/a P&S Ventures, Inc., a Florida Corporation d/b/a Best Roofing, and Gregg E. Wallick	01-7096 CACE 25	Goldstein, Tanen & Trench, P.A.,- Richard M. Goldstein, Esq.	D	Strategy, process, & technology infringement matter	Jul-01
First Bankcard Systems, Inc. v. Iktisat Bankasi Turk, S.A.	8:01-CV-1352-T-17MSS	White & Case LLP - Charles C. Kline, Esq.	P	Financial services ATM network implementation failure in Turkey	Oct-02
Applica Consumer Products, Inc. v. Siebel Systems, Inc.	03-22123-CIV	Greenberg Traurig, P.A. - David A. Coulson, Esq.	P	Siebel CRM system implementation failure	Aug-03
Equiflor Corporation v. Everpoint Incorporated	02-730 CA 2	Rosenthal, Rosenthal & Rasco- Eduardo I. Rasco, Esq.	P	Siebel CRM & Microsoft Great Plains financials implementation failure	Nov-03
The Collection LLC v. Universal Computer Systems, Inc.	03-000765-CV-361	Wayne T. Rife, P.C. & Marks & West, P.A.	P	Automotive Key Tracking system implementation failure	Nov-04
Beacon Application Services v. LNR Property Corporation	99-26419 CA 20	Bilzin Sumberg Baena Price & Axelrod LLP	D	PeopleSoft Financials implementation failure	Apr-05
Think Technologies v. Amazon Herb Company	Broward Co 17th Circuit Case 04-007749 (08)	Stuart & Walker, PA	P	Custom system development lawsuit	Mar-06
Streicher Mobile Fueling, Inc, Plaintiff, vs. Financial Accounting Solutions Group, Inc.	Broward County, Florida 17th Judicial Circuit Case #06-15965 (14)	Shutts & Bowen, LLP - H. Edward Patricoff, Esq.	P	SOX compliance & Microsoft Great Plains selection & implementation failure	Feb-08
Numark Industries, L.P. f/k/a Numark Industries, LLC v. The Hackett Group, Inc. d/b/a Answerthink	CA No. 11-19468-CA-01 (31)	Duffy & Sweeney, Ltd. - Robert Duffy, Esq.	P	SAP implementation failure	Feb-12