



Reagan Clay

Principal Finance Solution Consultant, Partner Advisor

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SUMMARY

Principal Finance solution consultant and partner advisor with 12 years across enterprise Financials, Accounting, **FP&A**, Procurement, **financial reporting**, ERP transformation, and strategic presales. Builds practical guidance for **Global System Integrators**, offering teams, architects, and solution consultants. Translates product direction and AI capabilities into persona based playbooks, demonstrations, competitive narratives, and customer conversations for CFO, Controller, and **Head of FP&A** audiences. Guides accounting agents, close automation, anomaly detection, forecasting, and intelligent procurement discussions with attention to audit trails, financial controls, data integrity, and compliance. Partners with product, technology, field, architecture, and consulting teams to shape offerings, mentor consultants, and maintain demo readiness. Brings grounded delivery experience and executive communication that can help partner ecosystems create credible, differentiated Finance solutions.

EXPERIENCE

Principal Partner Solution Consultant, Finance and AI

SummitCloud Applications 📅 January 2024 - Present 📍 San Mateo, CA

Leads strategic partner advisory across cloud Financials and agentic AI, connecting product direction with partner offerings, demonstrations, and executive Finance outcomes.

- Shaped GSI Finance narratives for CFO, Controller, and FP&A audiences using cloud Financials capabilities.
- Created partner playbooks for close automation, **anomaly detection**, forecasting, and **intelligent procurement** workflows.
- Guided AI governance discussions covering audit trails, **financial controls**, **data integrity**, and compliance requirements.
- Orchestrated product specialists, solution architects, presales leaders, and partners through complex Finance demonstrations.
- Evaluated partner built Finance agents and industry use cases, routing mature concepts to field teams.
- Mentored senior consultants on **competitive positioning** across legacy ERP, **point solutions**, and AI native platforms.

Senior Manager, Finance Transformation Solutions

BluePeak Consulting Group 📅 July 2021 - December 2023 📍 San Francisco, CA

Directed functional solution strategy for cloud ERP pursuits and transformation programs, linking Finance process design with executive value stories and delivery confidence.

- Led cloud ERP pursuits spanning **Core Financials**, **Accounting**, FP&A, Procurement, and financial reporting.
- Facilitated **CFO** and **Controller** discovery sessions connecting close, planning, controls, and reporting needs.
- Designed **Finance** demonstrations and executive presentations around process design and competitive differentiation.
- Built reusable persona narratives, discovery guides, objection responses, and Finance capability maps.
- Advised implementation leaders on control design, auditability, data integrity, and reporting requirements.
- Coached managers and consultants on solution quality, executive **storytelling**, and cross functional handoffs.

Senior Finance Solution Consultant

Evergreen ERP Solutions 📅 March 2018 - June 2021 📍 Oakland, CA

Owned Finance **solution consulting** for ERP opportunities, developing demonstrations, partner pursuits, competitive materials, and release readiness for enterprise stakeholders.

STRENGTHS

- 🗣 **Executive storytelling**
Turned complex Finance capabilities into clear CFO and Controller narratives, and partners began using those stories independently.
- 👥 **Partner enablement**
Built playbooks and discovery guides for GSI consultants. A practical format helped teams prepare sharper customer conversations.
- ❤ **AI governance**
Raised audit trails, controls, and data integrity early in Finance AI discussions. Risk teams gained useful context.
- 🔍 **Competitive insight**
Compared cloud ERP, legacy platforms, and point solutions in pursuit materials. Consultants found objections easier to address.
- 🏢 **Cross functional leadership**
Connected product, architecture, presales, and field groups during complex pursuits. Clear handoffs kept demonstrations moving.

SKILLS

Core Financials Accounting FP&A
Procurement Financial reporting
Enterprise ERP
Finance transformation Agentic AI
Accounting agents
Intelligent automation
Close automation

Anomaly detection

Real time forecasting

Financial controls

Solution consulting

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



● Principal Partner Solution Consultant, Finance and AI at SummitCloud Applications (2.8 Years)

● Senior Manager, Finance Transformation Solutions at BluePeak Consulting Group (2.4 Years)

● Senior Finance Solution Consultant at Evergreen ERP Solutions (3.2 Years)

● Finance Transformation Consultant at Redwood Advisory Partners (3.7 Years)

- Owned ERP **Finance** pursuits covering general ledger, payables, receivables, reporting, planning, and **procurement**.
- Converted discovery findings into executive demonstrations and solution narratives for Finance leaders.
- Aligned systems integrator pursuits around implementation assumptions, demonstrations, value messages, and objections.
- Developed competitive briefs comparing cloud ERP capabilities with **legacy platforms** and **point solutions**.
- Translated new Financials releases into updated demonstrations and customer use cases.
- Guided junior consultants through demonstration preparation and executive presentations.

Finance Transformation Consultant

Redwood Advisory Partners 📅 June 2014 - February 2018 📍 San Jose, CA

Delivered **Finance transformation advisory** and ERP implementation work across accounting, close, planning, procurement, reporting, controls, testing, and stakeholder workshops.

- Delivered ERP transformation work across **accounting**, close, planning, procurement, and **financial reporting**.
- Mapped Finance processes and control points with accounting and **FP&A** stakeholders.
- Configured and tested cloud ERP process designs, requirements, validation scenarios, and data dependencies.
- Prepared reconciliation prototypes that gave Controllers visibility into close status and data concerns.
- Facilitated workshops with Finance, procurement, technology, and implementation stakeholders.
- Supported proposals, demonstrations, and solution workshops while building **presales** capability.

PROJECTS

Partner Finance AI Playbook 📅 2025

Created persona based guidance for CFO, Controller, and FP&A conversations covering accounting agents, close automation, forecasting, controls, and partner positioning.

Enterprise Financials Demonstration Framework 📅 2022

Built reusable demonstration stories connecting Core Financials, Accounting, Procurement, reporting, and planning needs with executive outcomes and competitive context.

Finance Controls and Reporting Prototype 📅 2017

Developed cloud ERP prototypes for reconciliation, close visibility, exception review, auditability, and data quality discussions with Controllers.

LEADERSHIP & AWARDS

- Finance Transformation Mentor, Bay Area Professional Mentoring Network, 2022 - Present
- Volunteer Speaker, Cloud Finance Leadership Forum, 2023 - Present
- Recognized by consulting leaders for practical Finance storytelling and partner enablement

EDUCATION

Master of Business Administration in Finance

Santa Clara University 🎓 GPA: 4.0 📅 2014 📍 Santa Clara, CA

Coursework: Financial management, enterprise strategy, accounting, financial planning

Bachelor of Science in Accounting

California State University, East Bay 🎓 GPA: 4.0 📅 2012 📍 Hayward, CA

Coursework: Financial accounting, auditing, taxation, management accounting

CERTIFICATIONS

- Certified Public Accountant, California 📅 2015
- Certified Management Accountant 📅 2016
- FinOps Certified Practitioner 📅 2025

TECHNICAL SKILLS

- **Enterprise Financials:** Core Financials, Accounting, Financial Planning
- **Finance Operations:** Procurement, Financial reporting, General ledger
- **AI Finance Use Cases:** Accounting agents, Close automation, Anomaly detection
- **Forecasting and Planning:** Real time forecasting, FP&A, Scenario planning
- **Controls and Compliance:** Financial controls, Audit trails, Data integrity
- **ERP Delivery:** Cloud ERP, ERP transformation, Implementation
- **Partner Enablement:** GSI partnerships, Offering development, Partner playbooks
- **Presales Practice:** Solution consulting, Demonstrations, Customer discovery
- **Competitive Positioning:** Legacy ERP analysis, Point solution analysis, AI competitor analysis
- **Executive Communication:** Persona narratives, Executive storytelling, Objection handling
- **Finance Process Design:** Close management, Reconciliation, Workflow design
- **Reporting and Analytics:** Financial reporting, Exception analysis, Data quality

PROFESSIONAL AFFILIATIONS

- Bay Area Professional Mentoring Network, Finance Transformation Mentor
- Cloud Finance Leadership Forum, Volunteer Speaker

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST