Doris Xu, CA

ERP Finance Transformation Lead | Multi-Entity Governance, CoA & Operating Model Redesign

PROFESSIONAL PROFILE

Chartered Accountant and Finance Systems Manager with 10+ years driving financial operating model redesign, system implementations, and multi-entity governance across high-compliance institutional investment and multinational environments. Proven track record bridging executive leadership, BAU finance operations, IT, and external implementation partners. Extensive experience spanning Tier-1 ERP evaluations (Oracle Fusion, SAP S/4HANA, Workday), global Chart of Accounts (CoA) architecture, P2P workflow automation, cutover governance, and data migration across 52 entities in 13 countries.

CORE COMPETENCIES & LEADERSHIP CAPABILITIES

ERP Program & Workstream Leadership: Target Operating Model (TOM) design; Tier-1 ERP RFP evaluation (Oracle Fusion, SAP S/4HANA, Workday); cross-functional alignment between Finance, IT, and systems integrators; Steering Committee updates.

Chart of Accounts & Master Data Governance: Global CoA architecture and redesign; multi-dimensional entity/segment hierarchy alignment across NetSuite, Workday Adaptive Planning, and SAP; legacy data remediation and reconciliation.

Budgeting, Planning & Forecasting: Multi-year operational budgeting and rolling forecasts; 3- to 5-year strategic financial planning; enterprise consolidation loading (HFM, TM1/Polaris); Workday Adaptive Planning master data governance.

Process Transformation & Standardisation: End-to-end "as-is" to "to-be" workflow redesign across GL, AP, AR, P2P, Tax, and Cash Management; Delegation of Authority (DOA) rationalisation; eliminating customizations through standard ERP practices.

Statutory Compliance & Balance Sheet Integrity: Australian Accounting Standards (AASB/IFRS); Big 4 (PwC/EY) audit sign-offs; complex sub-ledger to general ledger reconciliations (3PL logistics to ERP); ATO Advance Pricing Arrangements (APA).

PROFESSIONAL EXPERIENCE

Finance Systems Manager

IFM Investors | Melbourne — Sep 2024 - Sep 2026

- **Finance Technology Roadmap & Tier-1 ERP RFP:** Formulated the CFO-sponsored enterprise finance systems roadmap with external transformation advisors. Led detailed RFP evaluations of Tier-1 ERPs (Oracle Fusion, SAP S/4HANA, Workday Financials), defining functional requirements, CoA scalability, and integration viability across 52 entities in 13 countries.
- **Cross-Functional Leadership & Operational Partnership:** Embedded in a 4-person systems team serving a 50+ member finance organisation. Acted as primary conduit coordinating Finance SME requirements with IT delivery, external implementation partners, and BAU stakeholders.
- **Multi-Entity System Consolidation & Cutover:** Directed system testing, ledger cutover, and balance migration for 9 legal entities during the ISPT integration across 300+ accounts. Identified consultant data-integrity flaws during rehearsal runs, enforcing strict reconciliation sign-offs prior to Go-Live.
- **Global Chart of Accounts & Master Data Alignment:** Governed the enterprise CoA hierarchy and dimensional master data spanning NetSuite and Workday Adaptive Planning, ensuring synchronized intercompany reporting and reporting integrity.
- **End-to-End P2P Process Redesign:** Led future-state process re-engineering as Finance SME for enterprise P2P transformation. Simplified complex legacy DOA approval workflows from 144 rules to 18 policies, projecting a 75% reduction in invoice cycle costs.
- **Vendor Governance & Enhancement Backlog:** Managed delivery governance with Oracle ACS and third-party integrators, establishing rigorous release testing protocols and reducing outstanding enhancement backlogs from 56 to 27 within fixed commercial constraints.
- **End-to-End Financial Platform Deployment:** Led the full-lifecycle implementation of Workiva from scoping and configuration to UAT, cutover, and training, enhancing statutory and executive reporting agility.
- **Capability Building:** Conducted practical automation workshops (Power Automate, Power Query) for finance analysts, fostering digital self-sufficiency across BAU finance teams.

Finance Manager (Commercial)

Servier Laboratories | Melbourne — Aug 2022 - Nov 2023

- **Team Leadership & Operational Governance:** Led a 5-person finance team overseeing financial accounting, statutory compliance, treasury, tax, and external audit for the Australian commercial entity, reporting functionally to the CFO.
- **Planning, Budgeting & Forecasting:** Directed annual operating budgeting, 3- to 5-year strategic planning, and rolling forecasts; managed model builds in TM1/Polaris and consolidated group data submissions into HFM.
- **Statutory Sign-Off & AASB Compliance:** Managed full-year statutory financial reporting under AASB/IFRS, successfully securing unqualified audit clearances with Big 4 auditors (PwC/EY) for the Australian operating entity.
- **Sub-Ledger to GL Reconciliations:** Investigated and resolved a legacy $3M warehouse-to-ERP inventory valuation variance; re-engineered daily and month-end 3PL-to-Dynamics NAV reconciliation workflows to guarantee balance sheet integrity.
- **SAP Early-Stage Solution Design:** Led finance workstream contributions during early-stage SAP ERP solution design. Defined global-to-local Chart of Accounts (CoA) mapping structures, established master data governance standards, and evaluated integration protocols (API vs SFTP).
- **Research Collaboration & Grant-Style Funding Governance:** Administered and audited financial allocations for joint research and clinical trial initiatives conducted with Australian tertiary universities, ensuring contractual milestone compliance, fund acquittal, and audit readiness.
- **P2P Automation & Systems Integration:** Led the end-to-end implementation of a cloud-based AP automation system and integrated EDI interfaces between 3PL logistics and Microsoft Dynamics NAV, eliminating manual invoice processing and strengthening internal controls.
- **Transfer Pricing & Tax Compliance:** Managed cross-border transfer pricing under an ATO Advance Pricing Arrangement (APA), executing cost-plus/margin calculations, related-party true-ups, and international audit documentation.

Project Accountant

APD Projects | Melbourne — Jan 2020 - Jul 2022

- Led project financial governance, multi-year cash flow forecasting, and project budgeting across commercial and residential developments valued between $70M and $600M.
- Established financial processes, standard operating procedures, and escrow controls for a $40M joint venture, satisfying external banking covenants.

EARLIER CAREER SUMMARY

- **Finance Manager | Novasteel International, Auckland | May 2018 - Feb 2020**
  Built an internal finance team, in-sourced accounting operations, and established financial controls, budgeting, and rolling forecasting frameworks.
- **Regional Accountant | Alaska Interior, Auckland | Jul 2017 - May 2018**
  Led regional rollout, data migration, and end-user training for the CatProjects enterprise budgeting platform.
- **Accountant | Kiwi Steel Holdings Group, Auckland | May 2014 - Jul 2017**
  Managed GL, intercompany reconciliations, cost accounting, and statutory month-end closes.

QUALIFICATIONS & PROFESSIONAL CREDENTIALS

Chartered Accountant (CA), Full Member | Chartered Accountants Australia and New Zealand (CA ANZ), 2018

Master of Professional Accounting | Victoria University of Wellington, 2013

Bachelor of Economics | Shanghai University of Electric Power, 2010

Professional Development: Microsoft Certified: AI Business Professional (2026); NetSuite AI Foundations Associate (2026); Full-Stack Web Development, Le Wagon (2024).

INDUSTRY CONTRIBUTION & LEADERSHIP

Committee Member, Marketing & Events | Australia New Zealand Chinese Accounting Association (ANZCAA) | 2023 - Present
Lead the development and delivery of practical masterclasses and webinars on enterprise AI adoption, systems integration, and automated finance workflows for senior accounting professionals.