
Where Innovation Meets Operational Excellence



VERTEX ADVISORS

Vertex Advisors LLC

Strategic Supply Chain Resilience, ERP Modernization, and Digital Transformation Partner

Executive Overview & Strategic Value Proposition

Vertex Advisors LLC is a Veteran-Owned Small Business (VOSB) dedicated to transforming supply chain operations and enterprise systems for resilience, efficiency, and sustained growth. We empower public sector organizations, healthcare providers, higher education institutions, and commercial enterprises with resilient, cost-effective solutions. As a veteran-led firm, we bring a disciplined, mission-focused approach to solving complex challenges, bridging defense-grade discipline with enterprise modernization expertise.

Our expertise ensures operational excellence through strategic planning, risk mitigation, process optimization, and innovative technologies like AI/ML-driven analytics. We specialize in vendor-neutral ERP evaluation and selection, supply chain risk management (SCRM), and IT project management, delivering measurable results such as multimillion-dollar efficiencies, reduced implementation risks by up to 45%, and enhanced compliance in regulated environments. Vertex aligns solutions with your strategic goals to drive sustainable success in a world of constant disruption.

Company Overview & Domain Expertise

Founded in 2021 and headquartered in Austin, Texas, Vertex Advisors LLC (CAGE: 9YSS0, UEI: ERMNSYDVQDV7) specializes in resilient, data-driven supply chain transformation, ERP modernization, and digital ecosystems. We help federal, state, local, education (SLED), healthcare, and commercial entities integrate cloud-based systems while addressing legacy challenges. Our services include:

972-677-9944
P.O. Box 873
Westminster, TX 75485
carl.ralph@vertexadvisorsllc.com
<https://vertexadvisorsllc.com>

- **Supply Chain Resilience & SCRM:** Predictive analytics, supplier risk mapping, disruption-resilient architecture, and compliance frameworks (e.g., federal logistics modernization).
- **ERP Strategy & Modernization:** Vendor-neutral selection and optimization for platforms like PeopleSoft, SAP, Oracle, and Workday, using our proprietary VSelect™ Methodology.
- **Digital Transformation & Data Integration:** AI/ML-enabled data governance, digital twin modeling, and autonomous planning for decision intelligence.
- **Organizational Change & Human Capital Alignment:** Ph.D.-level change management, value stream mapping, stakeholder engagement, and adoption strategies.
- **Program Management & Governance:** PMO structures, KPI reporting, cloud migrations, and risk-mitigation frameworks.

We do not sell or implement ERP systems (except providing project management for any ERP and specialized support for PeopleSoft HCM/FSCM), ensuring unbiased advisory focused on your needs.

Why Vertex Is the Optimal Partner

- **Vendor-Neutral ERP Expertise:** Deep experience with ERP systems for organizations with 750+ employees, reducing implementation risk by up to 45% via structured evaluation.
- **Supply Chain Specialization:** Expertise in JIT, predictive analytics, digital twins, and Disruption Resilient Supply Chain Architecture™ for multimillion-dollar efficiencies.
- **Public Sector Provenance:** Trusted advisor to MIT Lincoln Laboratory (FFRDC), Architect of the Capitol, and Olympic Medical Center, with a focus on federal compliance.
- **Diversity Advantage:** Joint Venture with Precision Management Solutions (PMS) – a certified MBE/WBE/DBE/SBE (MDOT & NMSDC) – meeting client diversity goals while enhancing IT and HCM capabilities.
- **Change Management Leadership:** Ph.D.-level experts in organizational transformation, ensuring high user adoption and minimized resistance.
- **Master Data & AI Integration:** AI/ML-driven frameworks for cloud-based integrations, data governance, and resilience.
- **Veteran-Led Innovation:** Mission-first execution with proven results across diverse industries, including healthcare, aerospace, defense, and manufacturing.
- **Strategic Partnerships:** Alliances with Navisite (AWS Premier Tier, SAP Gold Partner, Oracle Principal Partner) and Palo Alto Networks for cybersecurity, enabling end-to-end solutions in cloud migration and ERP hosting.

Our partnership with PMS delivers integrated compliance, diversity, and execution, allowing primes and clients to achieve performance and inclusion goals in multi-year programs.

Representative Projects & Past Performance

Vertex has a proven track record in complex transformations:

- **MIT Lincoln Laboratory (FFRDC, Public Sector):** Supply chain engagement and procurement gap analysis; delivered 600+ pain point assessments, master data management recommendations, and a transformation roadmap for enhanced visibility and efficiency.
- **Brookdale Senior Living (35,000 employees, Healthcare):** ERP selection for HCM and financial systems; streamlined vendor evaluation (PeopleSoft (Legacy system)/Workday/Oracle), achieving compliance and operational efficiency across nationwide facilities.
- **Olympic Medical Center (County Hospital, Public Sector):** ERP selection and implementation support for Finance/HR; led to Workday adoption and seamless integrator selection.
- **Architect of the Capitol (Public Sector):** SCRM assessment; identified vulnerabilities with recommendations endorsed by the Inspector General.
- **Shop-Vac/Arrow Fasteners (Commercial Manufacturing):** ERP evaluation for scalability; accelerated selection, reducing time and improving ROI.
- **Zebra Technologies (Commercial):** Multi-year global cloud migration program management; ensured uninterrupted operations and enhanced scalability across international units.
- **Jefferson Health (Healthcare):** Supply chain optimization; delivered significant cost savings through logistics and ERP inventory solutions.

These projects demonstrate our ability to handle siloed system replacements, cloud migrations, and transformations for large organizations.

Leadership Team & Credentials

Our team combines technical depth with industry-specific knowledge, drawing from decades of experience in supply chain, ERP, IT, and organizational transformation across public and private sectors.

- **Carl Ralph – Managing Director:** Carl Ralph is a seasoned supply chain practitioner and Managing Director at Vertex Advisors LLC, bringing over 20 years of transformational leadership in supply chain engineering, enterprise application strategy, and IT project management. As a veteran-owned business leader, Carl combines a disciplined, mission-focused approach from his military background with deep technical expertise to help organizations achieve operational excellence across public and private sectors. With graduate training in Supply Chain Management from MIT and training in Lean Operations directly through Toyota Production System (TPS), Carl specializes in delivering innovative, cost-efficient solutions that align seamlessly with strategic goals. His analytical approach to

designing measurable, results-oriented strategies has proven successful across diverse industries including healthcare, aerospace and defense, public health, financial services, and manufacturing. Carl's expertise at Vertex Advisors encompasses supply chain risk management, ERP selection and implementation, process optimization, and digital transformation initiatives. His innovations have delivered substantial measurable results, including supply chain engineering an ERP inventory optimization solution that saved a healthcare client over \$600K in the first year and reducing the nation's largest pediatric hospital's inventory levels by approximately 12% while decreasing stock-outs by 85%. At Sierra-Cedar Inc., he served as Senior Director of Supply Chain Engineering, where he re-engineered purchasing processes and managed ERP consolidations for major hospitals. Previously at Beacon Application Services, he orchestrated supply chain redesigns for 17 clients, improving performance by 15-20%. Earlier roles include Director of Supply Chain Management at Applied Power Worldwide and Director of Procurement and Materials at AVO International, where he streamlined processes, reduced costs by over 24%, and boosted delivery by 15%. .

- **Dr. Farid Harche – Senior Principal, Supply Chain Transformation:** Dr. Farid Harche is a transformational executive with 25+ years of leadership in strategy, technology, and operations, specializing in supply chain innovation and resilience. He has a proven ability to formulate and execute strategies that optimize performance, mitigate risk, and enhance agility in complex global environments. His extensive expertise includes advisory consulting, AI-driven analytics, and supply chain management to drive continuity and competitive advantage. Recognized for leveraging emerging technologies, leading business transformation, and fortifying supply chains for sustained success, Dr. Harche excels in navigating organizational change, fostering innovation, and cultivating high-performance teams. At MIT Lincoln Laboratory (contractual, 2024), he transformed supply chain operations by implementing digitization and AI-driven strategies, reducing total cost of ownership by 20%. At Tata Consultancy Services (2023-2024), he led risk management initiatives for consumer goods brands and AI automation for a major retailer, impacting \$300M in revenue and improving forecast accuracy by 10%. At Infosys Consulting (2021-2023), he designed supply chain risk management digital twins and resilience offerings for specialty retailers. Earlier roles at Capgemini, Samsung, and Motorola delivered \$300M+ in efficiencies through AI/ML optimization. Fluent in English, French, and Arabic. Education: Ph.D. in Operations Research (Carnegie Mellon University); M.S. in Operations Research (Carnegie Mellon); B.S. in Mathematics (University of Algiers). Demonstrated skills: Strategic Planning & Execution, Enterprise Risk Management, AI/ML, Supply Chain Transformation, Data Analytics & Optimization.
- **Dr. Yulin Kriz – Senior Principal, ERP & Technical Solutions:** Dr. Yulin Kriz brings more than 27 years of experience in PeopleSoft HCM, Financials/Supply Chain Management (FSCM), and Campus Solutions, spanning functional and technical roles in financial/banking, healthcare, retail, higher education, public sector, and communications industries. She has participated in all phases of system development lifecycles, with emphasis on implementation, integration, testing, deployment, and maintenance. As a functional specialist, technical lead, developer, systems analyst, and programmer, Dr. Kriz

has performed analyses, designed customizations, interfaces, and reports during implementations and upgrades. She has strong knowledge in PeopleSoft 9.2 HCM and FSCM, serving as a key communicator among teams to resolve issues, coordinate conversions, and mentor juniors. Recent roles include FSCM Technical Developer at ManTech (2020), where she developed Workday interfaces; Payroll to GL Functional Specialist at Thomas Jefferson University (2020-2019), configuring setups and customizing interfaces; and Functional Lead/PTF Developer at Navy Federal Credit Union (2019-2020), leading testing frameworks. At Oakwood Healthcare (1998-2010), she led HCM and FSCM implementations and upgrades. Technical skills: PeopleTools, PeopleCode, Application Engine, Integration Broker, BI Publisher, Component Interface, Web Services, SQR, Query, Crystal Reports, nVision. Education: Ph.D. in Computer Science (City University of New York); M.S. in Computer Science (City University of New York); B.S. in Computer Science/Mathematics (Nankai University). Certifications: Oracle Certified Professional (OCP) Internet Developer; Oracle Certified Global HR Cloud Implementation Specialist; PeopleSoft Certified Implementation Specialist; Project Management Professional (PMP).

- **Cynthia Casemyr – Director, IT Solutions Delivery:** Cynthia Casemyr brings over two decades of strategic IT leadership experience to Vertex Advisors LLC, where she serves as Director of IT Solutions Delivery. With an MBA and extensive background in life sciences information technology, she specializes in partnering with leadership teams to leverage technology in support of strategic business objectives. As a transformational leader, Cynthia has a proven track record of developing and deploying technologies that provide competitive advantage, attract and retain customers, increase operational efficiency, and reduce costs. Her expertise spans technology solutions in regulated environments, data management software and services, and product management for software services. Prior to joining Vertex Advisors, Cynthia served as Director of IT for the College of Arts, Sciences & Education at Florida International University, one of the largest universities in North America, where she led IT functions supporting over 600 faculty and staff. During her tenure, she successfully managed the transition to remote operations during the pandemic, implemented HIPAA compliance initiatives, and established strategic research computing resources. Previously, as Vice President of Clinical Research Systems at BioTelemetry Research, Cynthia directed technology strategy for clinical research services, managing multi-year technology roadmaps and achieving significant cost savings through strategic insourcing initiatives. She successfully led the "insourcing" of IT operations, resulting in \$1.7M in savings in the first year and \$2M in 2016. Her experience at Phase Forward Inc. (now Oracle Health Sciences) included expanding service offerings from \$9 million to \$46 million in revenue through strategic development of validation services, business process optimization consulting, and new product commercialization processes. Cynthia's core competencies include technology roadmap development, systems validation and deployment, cloud infrastructure implementation, team leadership, and regulatory compliance in highly regulated environments. She brings valuable expertise in both public sector and private industry IT solutions delivery to Vertex Advisors' government contracting and consulting practice. Education: MBA (Babson College); BA (Boston College).

- Dr. Jimmy Brown – Senior Consulting Executive, Change Management:** Dr. Jimmy Brown brings over 25 years of expertise in organizational development and change management to Vertex Advisors LLC. As Senior Consulting Executive, he specializes in delivering practical strategies for business performance improvement, leadership development, and cultural transformation in complex ERP implementations. Holding a Ph.D. in Industrial/Organizational Psychology, Dr. Brown is a Board Certified Coach (BCC) and founder of Fullview Leadership. His expertise includes diversity and inclusion initiatives, career development coaching, and systems thinking for organizational change. He serves as a psychology professor, Academic Quality Reviewer, and Dissertation Chair at Grand Canyon University and Walden University, teaching research methods and performance improvement. Dr. Brown's consulting focuses on value stream mapping, process optimization, and stakeholder engagement—critical for ERP transitions. He has authored books including "Systems Thinking Strategy: The New Way to Understand Your Business and Drive Performance" (2012), "Journey Management: Unleashing the Strategic Power of Change" (2013), and "The 7 Assumptions That Drive Success & Happiness" (2018), emphasizing data-driven change and business strategies. At Vertex, Dr. Brown leads change management for public and private sector clients, conducting workshops, surveys, and impact analyses to ensure high user adoption and minimize resistance in large-scale transformations. His career includes senior roles at BetterUp (Distinguished Fellow Coach, 2022-present), Hewlett-Packard (Business Consulting Group Manager, 2010-2012), Inforte Corp. (Principal, 2006-2007), Accenture (Manager, 2001-2002), and Booz Allen Hamilton (Senior Consultant, 1999-2000). Representative projects include leadership coaching for executives across industries (2197+ hours), strategic planning for hydroelectric providers, and change management for SAP implementations. Dr. Brown is a frequent speaker at conferences like the Academy of Management and has presented on topics such as leveraging video for doctoral learners and maximizing leadership styles. Certifications: Board Certified Coach (BCC), Professional in Human Resources (PHR), Certified Birkman Consultant, Registered Organizational Development Consultant (RODC). Affiliations: American Psychological Association, Society for Industrial & Organizational Psychology, Society for Human Resources Management. Education: Ph.D. in Organizational Development (Benedictine University); M.A. in Industrial/Organizational Psychology (University of Tulsa); B.A. in Psychology (University of Arkansas at Little Rock).
- Gary Humphrey – Principal, Strategic Growth:** Gary Humphrey is a strategic and results-driven technology sales and account management leader with over 30 years of success in professional services consulting. He excels in developing strategies and closing net-new accounts, identifying and expanding existing customer relationships and opportunities. With deep expertise in Human Capital Management (HCM), Enterprise Resource Planning (ERP), account management, and managed services, Gary is technically proficient and adept at driving business growth through innovative sales models, cross-functional leadership, and a client-centric approach. At Sikich LLC (2020-2025), as Managing Director, he led strategic business development and account management for advisory services across diverse industries and global markets, managing client relationships, retention, growth, and planning. He led full-cycle sales efforts, customized client approaches, and

collaborated on marketing campaigns. Core competencies include Strategic & Advisory Services, Executive-level Account Management, HCM & ERP Systems (Workday, Oracle), Salesforce, Microsoft CE, MuleSoft, Splunk, AWS, and industry knowledge in Manufacturing, Healthcare, Professional Services, High-Tech, Entertainment & Media, and Public Sector. Tools: Zoominfo, LinkedIn Navigator, MEDDICC. Education: Not specified in provided documents, but extensive professional experience.

Certifications, Registrations & NAICS Codes

- Veteran-Owned Small Business (VOSB)
- JV Partner: Precision Management Solutions (MBE/WBE/DBE/SBE via MDOT & NMSDC)
- NAICS Codes: 541611 (Administrative Management Consulting), 541614 (Supply Chain Consulting), 541512 (Computer Systems Design), 541519 (Other Computer Related Services), 541715 (R&D in Physical/Engineering/Life Sciences), 541990 (Other Professional/Scientific/Technical Services)
- PSC Codes: R706, R499, R799, R425, R406
- NIPG Codes: 91875, 91871, 91829, 96156, 95889

Contact Information

Vertex Advisors LLC 5900 Balcones Dr., Suite 20625, Austin, TX 78731

Mailing: PO Box 873, Westminster, TX 75485 Phone: (972) 677-9944 | Cell: (972) 430-8525

Email: Carl.Ralph@VertexAdvisorsLLC.com Website: <https://VertexAdvisorsLLC.com>

EIN: 87-3437964 | DUNS: 120170230 | Ariba ID: AN11211536773

At Vertex Advisors, we bring clarity, collaboration, and disciplined innovation to every engagement. Let's build a resilient future together.