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Platform Developer 1(95%), Admin 201, PMP Certified
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Summary

- **DREAMFORCE Two Time Presenter**, Developer Track
- 20+ year IT veteran, **5 ½ years Salesforce primarily in Service Cloud, Sales Cloud**. Marketing, eCommerce, Community Clouds secondary
- **ADOPTION SUCCESSES**: 5000+ satisfied users.
- **HOT SITUATIONS, RESTORING TRUST, TURNAROUNDS**: Led two major turnarounds, four notable “restoration of trust” projects.
- **OFFSHORE**: Numerous projects, with daily standups.
- **AGILE RESULTS**: 800+ user stories defined, 450+ brought into production.
- **LARGE PROGRAMS, PROJECTS LED**: Verizon: \$10 million program, State of Texas: \$8 million program, FedEx \$6 million program, Celanese \$5 million project.
- **OTHER CLIENTS**: Fidelity, Boeing, Texas Instruments, Frito Lay, Mitel, TE/Tyco, Flowserve, Hyundai
- **CONSULTING EXPERIENCE**: Cambridge Technology Partners, D&B Software, Cognizant, Infosys, IBM_(spinoff)
- **TECHNO-FUNCTIONAL** leader able to break extreme technical complexity into manageable parts, action and results. Happy to serve managing a \$10 million program or hands-on as technical BA, PM/Scrum Master, Admin, specializing in Declarative no-code workflows.
- **RESULTS for CLIENTS**: \$200 Million+ in Sales Gains, \$75 Million+ in Cost Savings
- **RAPID RESULTS**: 11 projects delivered \$100,000+ payback/value in 90 days.
- **SKILLS BEYOND SALESFORCE**: Six Azure, Cloud Hosted Complex Projects into Production, SQL Server, SSRS, SSIS, ETL, Visual Studio, Data Tools to 3 TB of Data, 200,000 Records, Difficult Upgrades, MS Server, PowerShell, VMWare, REST API. Partial Skills: JavaScript, Visual Studio, HTML 5, CSS 3, XML, JSON.
- **INTEGRATIONS**: SQL Server, SAP, Oracle, Baan, Office 365, Azure, SharePoint, Numerous Homegrown with Informatica, Mulesoft tools.
- **BOOK**, peer reviewed journal study, 50+ articles.

Most Relevant Salesforce Projects

Fidelity Investments, Salesforce Service Cloud Investment Services Project **(3 Months, 2020)**

Led project as Infosys senior consultant, solution architect, senior BA/PM. Goal was Rapid Discovery and Due Diligence for investment operations project.

DEVELOPMENT / ARCHITECTURE WORK:

- **ARCHITECTURE** Initial rough design using Service Cloud including 38 Standard and 7 Custom Salesforce Objects, Requirement Traceability, Nine Integrations, 45 Record Types. Architect completed.
- **LICENSE COST REDUCTION** Multiple integrations designed to export data, reduce Salesforce license cost. Highest savings from Budget, Legal, Regulatory workflow approvals.

BA / PM / SCRUM MASTER WORK:

- **AS-IS, TO-BE PROCESSES** Documented for 20 major processes, 100+ sub-processes, 1500 users.
- **DELIVERABLES** Requirements, AS-IS, TO-BE Processes, Architecture, ERD, Interfaces, Permissions Model, Epics, Features, User Story definition, Road Map, Detailed Implementation Plan, Gap Analysis.
- **RAPID RESULTS** Reduced "Time to Value" from 5 Months to 30 Days.
- **REQUIREMENTS to USER STORIES** Led 20 Requirements Workshops resulting in 640 Requirements consolidated to 12 Epics, 30 Features and 284 User Stories ready for Jira import. 200+ requirements deferred, removed from scope.
- **SCOPE CONTROL**: Completed poorly defined project and resisted extreme client demands to increase scope.
- **SCOPE** included Add, Terms & Transfers, Renew Services, Service Onboarding, Contract Management Life Cycle, Service Requests, Vendor Onboarding, Vendor Corporate Actions, Vendor Performance Management, Invoice Reconciliation, Review Services and Users, Trials, Vendor Relationship Changes, Vendor Risk Management, Vendor Offboarding, New Investment Product Support, Legal Review and Partnerships, Index Licensing, Original Service Experience, Spend Approvals, Manage Vote, Technical Foundation.
- **TRAINED** 25 users in 20+ OOB features resulting in **100+ requirements removed from scope because users could self serve**. Training Quick-Videos created to aid users.

ADMIN, DECLARATIVE, CONFIGURE, NO CODE WORK: Configured/demoed/tested/implemented following:

- **ACTION ITEM TRACKING, ENTITLEMENTS, SLAs, MILESTONES, Due Dates, Escalation when Overdue**. Created POC for user training, scope containment.

- CUSTOMIZATION, ADVANCED Relabel Standard Object, Add Custom Fields, Dependent Picklists, Field API Labels, Record Types, Related List, Related Object, Related Record
- DATA IMPORT, EXPORT Import From Excel
- DUPLICATE DATA DE-DUP, PREVENTION, CLEANUP, KEEP CLEAN
- EMAIL TEMPLATES Trained users so able to self serve
- LIGHTNING MIGRATION, CONSOLE: Collapsible List View Panel, Lightning Custom Apps, Create Lightning Record Page, App Page, Lightning Components Template
- LIST VIEW, REPORTING, DASHBOARDS Trained users to self-serve
- MOBILE Quick Entry Form
- NAVIGATION, IMPROVE, STREAMLINE FOR USER Actions, Global Actions, Activities, App Launcher, Configure App Tabs, Sub-Tabs, Controlling Tabs Displayed, Classic Page Layouts, Default Page, Field Position, Field Sequence Navigation, Links, Macros, Object Manager, Quick Text, Rich Text Component, Send Email Button And Log A Call, Surveys, Tags, Utility Bar
- SANDBOX Created
- SECURITY, ACCESS, PERMISSION SETS, SHARING RULES, PROFILES Access, Profiles Set for Custom Apps
- SERVICE CLOUD Configured, demoed, trained users on CASES, Email To Case, Lightning Case Console, Print Case To Pdf, 20+ OOB capabilities.
- VALIDATION RULES Control contract date range, service effective periods

DFWJLT, a Job Training, Job Leads Non-Profit (Includes Infosys Advanced Training) (4 Months, 2020)

Served as **volunteer Salesforce Certified Admin, Developer**, Tester, Training for Org standup and its ongoing mission to train people in Salesforce and help them rapidly find work in the DFW area. Received advanced training from Infosys during same period, consolidated here for brevity.

DEVELOPMENT / ARCHITECTURE WORK:

- APEX Email Class Handler, shows how to break code into manageable, reusable units.
- APEX Full Life Cycle of Complex App, **10% Discount Auto-Applied to All Items as Entered**. Class, Method, Trigger, Test Class, Deployed to Production.
- APEX TRIGGER for Account that matches Shipping Address Zip Code.
- API, METADATA In depth developer training to understand what can be deployed to production from sandboxes.
- INTEGRATION TO Office 365 SharePoint Files Connect Method configured and working. Lightning Connect method not working.
- INTEGRATION, EXTERNAL OBJECT METHOD Developed app showing orders and order details retrieved from external system. Data is not stored in Salesforce – retired in real time only as needed.
- **LIGHTNING APP** Complex app developed for Opportunity Closed, Discount Approval, Scheduling, Deposit, Cancellation and refund. Includes custom objects, record types, page layouts, advanced workflows for record creation, Sales Processes (top bar progress bar).
- **LIGHTNING APP, GEOLOCATION** Developed complex app to display Account locations in map within Salesforce record using coordinates. Helps Account rep plan route, minimize travel.
- **LIGHTNING COMPONENT** developed in Visualforce to display in Lightning.
- SANDBOX Change Sets configured and deployed custom Lightning apps, components, metadata to production.
- **SFDX CONTINUOUS INTEGRATION** Geolocation Lightning app built with GitHub as repository, creating project on local PC, using scratch orgs for dev, pull changes to local project, commit changes to GitHub. Included code, merge branches, release to production.
- SOQL Query showing Adoption of new app by page view.
- TOOLS USED VS Code, Illuminated Cloud, Welkin IDE, Developer Console, Development Mode Footer, Workbench, Schema Builder, Dataloader. Dataloader.io.
- VISUALFORCE App developed allowing safe, rapid, manual updating of accounts, shows parameters passed in URL.
- VISUALFORCE developed quick edit page for opportunities, allows rapid update of forecast.
- VISUALFORCE multi-object edit page developed to easily see and edit all contacts for an Account.
- VISUALFORCE page developed to easily edit industry for all accounts.
- VISUALFORCE page developed to export all contacts for an account to Excel with 1 click.

BA / PM / SCRUM MASTER WORK:

- **PROGRAM MANAGEMENT, SAFE** Studied Scaled Agile Framework (SCRUM OF SCRUMS) in preparation for client assignment.

ADMIN, DECLARATIVE, CONFIGURE, NO CODE WORK: Configured/demoed/tested/implemented following:

- **BtoB ECOMMERCE** (Formerly CLOUD CRAZE) Attended extended developer training. Configure **STOREFRONTS**: Multiple + Reseller, Basic OOB + Custom, Theme / look / feel, SF Communities, For multiple locations, accounts, Customer's Customer, Spotlight, Featured Products, Promotions, Login, Passwords, Menus, Navigation, Carts, Orders, Subscriptions, Invoices, Currencies, Language, Quick Order, Product Compare. **PRODUCT**: Kits, Dynamic Kits, Bundles, Related Products, Aggregated, Categories, Price, Specifications, Details. **PRICELISTS**: Standard, Contract, Per Account, Catalog, Currency. **ORDERING**: Subscriptions, Attribute Driven, Multiple Ship-To, Multiple Account. **INTERFACES**: Credit Card, Products, Pricing, Inventory, Orders, Sales Tax, SSO, Promotions, Service Management, Credit Limit, Shipping, Payments.
- **CASES**: Credit Limit, Order Correction, Invoice Correction, Returns.
- **COMMUNITIES** Configured, evaluated and created POC for client assignment.
- **LIGHTNING CONSOLE** Extensive configuration, Email to Case, with templates to improve user screens, experience.
- **RELEASE MANAGEMENT WITH SFDX** (Salesforce Developer Experience) Integrated Dev Environments, Code Repository as "source of truth".
- **SHIELD ENCRYPTION** Configured and POC developed for client assignment.
- **STEEL BRICK** (formerly CPQ) Evaluated for possible client work, extension of previous CPQ work with Microsoft.
- **TEST DRIVEN DEVELOPMENT**: Studied, prepared this development method for use in Agile projects with excellent results on TE Connectivity project. Fully 1/3 of requests will go away when starting from "how will we test?" Approach became design users story acceptance criteria and unit test from requirements initially > verify failure > code to satisfy test > iterate with another requirement > verify failure > code to satisfy test. Substantial improvement but regression, other testing out of our control so not fully implemented.
- **WORKFLOW, TIME BASED** Adds reminder to Tasks with time based workflow queue.

Solera (Auto Parts, Tech, Services) Salesforce Sales Cloud, Service Cloud Outsourcing Project (1 Month, 2020)

Served as Infosys Solution Architect, Senior Consultant in support of outsourcing project for 1100 Salesforce users.

- **ASSESSMENT** Provided Salesforce assessment and input to outsourcing team. Included 7 Salesforce orgs, 600 major workflows, 936,000 lines of Apex code, 30 business units.
- **RECOMMENDATION** Team of nine and 90 day documentation / ramp up / handoff period to outsource help desk. Recommended prioritization of highest value apps only in order to support users within available budget.
- **PROGRAM CHALLENGES** Common Salesforce problems such as too many triggers on object, too many fields and workflows on some objects, acquired companies not consolidated to standard processes, inability to execute complex downstream contracts and fulfillment were traced to large scale "go go go" of low and no code solutions, lack of documentation, lack of people who understood apps.

TE Connectivity, Salesforce Service Cloud, Lightning Migration for 125 Call Center Agents (14 Months, 2018-19)

- Led project as Infosys senior consultant, BA for Service Cloud, including significant Sales Cloud applications. Goal of project for 125 agents was Lightning migration, Case optimization and CTI / Omni-channel skill based routing for phone, chat, web and email cases to advanced Agent Console with six integrations and advanced 3rd party software capabilities including 360 View of the Customer. Included major sales process improvements for Hot Leads, **Warm Hand-off of Leads to Distributors, Lead Conversion, Marketing Lead Gen and Qualification, Sales Lead Qualification. Significant Live-Agent chat integration with company website with product list.**
- **2X DREAMFORCE 2019 PRESENTER** for work on this project: "Lightning Console for Agent Productivity" and "360 View Of the Customer for the Agent."
- **BEST QUOTES** "I get things done with 10 times less effort using Tom's team" (Product owner.) "BUSINESS NOW BELIEVES IT DEPARTMENT CAN DELIVER" (after failure of two previous vendors.)

DEVELOPMENT / ARCHITECTURE WORK:

- **ARCHITECTURE JUMPSTART THROUGH EXTREME TECHNICAL COMPLEXITY** To push team to "stop talking, get down to action", created initial and ongoing solution designs, architecture maps for six interfaces, 360 View of the Customer for Agents, three phases of Skill Based Routing, optimized routing of phone, chat, web form and email submitted cases, CTI-Phone Routing with Omnichannel, third party software. Key output was reducing big, complex efforts to tasks, features and user stories which team could grasp and move ahead.
- **TECHNICAL DEBT, SLOW RESPONSE TIME RESOLUTION** included UML mapping to consolidate, improve, refactor old Apex code, Trigger Framework consolidation needed for Opportunities, Cases first. Report on technical debt priorities including using custom Lead Mgmt instead of OOB, Opportunity unconsolidated with 500+ fields, 20+ triggers, unreliable workflows, rules, custom Forecasting instead of OOB, custom VF partner Community instead of OOB.

- **CONTINUOUS INTEGRATION, DEVELOPER BARRIERS** Worked to resolve numerous problems with GitHub as source of truth, Architect code review/compare, Copado and Eclipse issues with sandboxes (daily code commit, lost work, elevate, roll-back) ANT deployment problems. Tool improvement needed stop time waste, use API 46.
- **INTEGRATIONS** Specified for SAP, Oracle, Eloqua, four inhouse systems

BA / PM / SCRUM MASTER WORK:

- **AGENT PRODUCTIVITY IMPROVEMENTS** described here were primary driver. **Estimated at \$200 million savings and gross profit over 5 years.**
- **AGILE CADENCE** executed daily/ weekly included User Story Refinement, Backlog Grooming, Scrums (Daily Standups) Kanban Board, Sprint Planning, Road Map, Release Planning, Burn Down / Burn Up charts, Architect Review, Demos, Retrospectives.
- **AGILE ESTIMATING** Used Order of Magnitude dollars/hours estimates initially, Story Points thereafter.
- **AGILE PITFALL PREVENTION** Prevented scope creep, undisciplined requirements gathering meetings, too many iterations, stories never completed, unqualified personnel**
- **AGILE TOOLS, STANDARDS** Jira, Confluence, **USER STORY STANDARDS (INVEST.)**
- **AGILE TEAM GUIDELINES**, Job Definitions, Procedures, Cadence defined, enforced best able.
- **BIG PICTURE, GRASP VISION** Consolidated and documented the vision for 20 projects into a whole with numerous maps, charts, roadmaps – eventually epics, features, users stories. Included Spider Web Chart and Architecture Maps.
- **CASE ROUTING** with CTI / Omni-channel skill based routing for phone, chat, web and email cases. Included We Chat, Lead Follow Up Object, Quote Object, hand off chat between agents, Easy customer send files to agent, Queue Management reducing 300+ queues to skills based routing, Routing on Inquiry Type, **LIMIT AGENTS TAKING MULTIPLE CALLS / CHATS AT SAME TIME.**
- **CUSTOMER 360** Advanced, complex, six integrations project with 20 second response time constraint. Broke effort into extensive wireframes, phases, top 10 use cases and drove successful POC. Resulted in presentation given at Dreamforce 2019.
- **EARN HIGHER MARGINS IN A COMMODITY BUSINESS** Client has top gross margins in industry at 34.5% and has sustained higher long term profits than other competitors. Much is due to projects like this emphasizing **CUSTOMER SERVICE THAT GROWS SALES.** E.g. Archive of technical specifications for all products - last 30 years is maintained for product specialists (no other competitor has this.)
- **eCOMMERCE WEB SITE** Processes for chat pop up, live agent hand off, lead hand off to Case defined, integrated with overall case, lead management. Advanced identification of prospects, customers by email, phone number and ip address.
- **EMAIL** Improvements including advanced attachments, image, spreadsheet embed, signatures, preview on hover, advanced marketing links with security.
- **ITAR** Regulatory compliance feature completed, **preventing fines up to \$500,000.**
- **LIGHTNING MIGRATION from Classic for 125 Agents** with dozens of Lightning screen mock ups / wire frames, power user, product owner demonstrations / POCs.
- **LIGHTNING MIGRATION WITH VIDEO PROCESS MAPPING** Used to confirm all Sales Agent Lightning screens and permissions ready for cutover from Classic.
- **LEAD QUALIFICATION Process improvement, migrated to LIGHTNING. Marketing Lead to SALES QUALIFIED LEAD with Enhanced Lead Scoring.**
- **MEET COMPETITIVE PRICE** Request process for distributors and internal sales people. Defined, handed off.
- **MOBILE** Allow Agents to Work Remotely. Designed all screens with Tablet support where practical.
- **PAYBACK RESULTS Cost Savings of \$9.8 Million and Gross Profit of \$216 Million** Expected Over Five Years (Moderate estimate.)
- **PROGRAM MANAGEMENT** Led effort first 60 days resulting in 300 user stories organized into **six Epics, 18 Features, backlogs for four Agile teams.**
- **RAPID RESULTS Four QUICK-HIT ITEMS**, implemented rapidly, resulting in **\$9 Million gross profit** estimated over 5 years. Included Hot Lead optimization, Warm Hand-off of Leads to Distributors, Email to Case for six business units and numerous small improvements.
- **REQUIREMENTS to USER STORIES** Led work to consolidate 300 Requirements from 20 projects to six Epics, 18 Features and 300 User Stories in Jira in just 60 days.
- **ROAD MAP** with six Epics, 18 Features 300 User Stories with Order of Magnitude Estimates completed in 60 days, **resulting in budget approval of \$2.5 million.**
- **SCOPE Defined as 50 line items**, Organized for Payback tracking
- **SINGLE POINT OF TRUTH** for all user stories, supporting documents, test plans, bug fix, technical documentation, development standards, team rules, guidelines
- **TEST DRIVEN DEVELOPMENT** Enormously helpful for complex requirements, First defined “how can we test this?”, then user stories, acceptance criteria, full UAT.
- **UNIVERSAL AGENT** Any Agent Able to Do PIC, CC, Inside Sales Job. Extensive PROFILE consolidation.

- **USER STORIES INTO PRODUCTION:** Led work which **delivered 225 user stories in 14 months.** 100+ additional stories defined and handed to other teams.
- **VIDEO PROCESS MAPPING** Rapidly defined AS-IS and TO-BE processes, sub-processes, use cases, user stories. with minimum user and IT person labor. Used heavily for Lightning Migration, Hot Lead Optimization
- **WARM HAND-OFF OF LEADS TO DISTRIBUTORS** Designed resolution to lost sales problem. **\$16 million** payback / revenue recognition improvement over 5 years.
- **WORKFORCE MANAGEMENT** Work Queue Prioritization allowing supervisors better manage Agent workload, improve Agent performance, less supervisor labor.

ADMIN, DECLARATIVE, CONFIGURE, NO CODE WORK Configured/demoed/tested/implemented following:

- **PROCESS BUILDER** Hot Lead **workflow clean up, consolidate from 40 steps to 5.**
- **POWER USER TRAINING, DEVELOPMENT** Started Power User Council primarily to confirm **LIGHTNING MIGRATION processes, screens were correct.** 12+ training, demo, feedback sessions. Lightning screen navigation, Advanced Search, Macros, Advanced Email Attachments, Action Item Tracking.
- **KNOWLEDGE** Included advanced, semi-automated creation of articles from email trail, minimum labor, delay.
- **ACTION ITEM TRACKING, ENTITLEMENTS, SLAs, MILESTONES, Due Dates, Escalation** when Overdue, including Time Zone adjustment. Included Actions for Product Managers and Engineers without Salesforce license.
- **CUSTOMER SURVEYS** including Chat based surveys. Extensive for multiple divisions.
- **PROFILE, HYBRID, CONSOLIDATION FOR UNIVERSAL AGENT** Required consolidation of 12 profiles to four. Performed extensive testing to enable any agent to do Product Specialist, Customer Care or Inside Sales Job in Lightning.
- **EMAIL to CASE** Defined and executed rapid deployment to six business units after initial Channel effort.

Boeing Aircraft, Salesforce Sales Cloud Consolidating 8 CRM Systems to One Salesforce Org (5 Months, 2018)

Initially led project as Infosys Senior Technical Program Manager during ramp-up. Subsequent roles included Integration/Migration Scrum Master, App Dev Scrum Master. **First person hired to ramp up team of 24 contractors.** Goal was to migrate / consolidate **8 business units with 11 integrations to a single Salesforce org for 1000+ users.**

DEVELOPMENT / ARCHITECTURE WORK:

- **ARCHITECTURE JUMPSTART THROUGH EXTREME TECHNICAL COMPLEXITY** To push team to “stop talking, get down to action”, created initial and ongoing solution designs, architecture maps for 11 interfaces, 10 standard objects, 6 custom objects, and consolidation of eight business units to a single Salesforce Org.
- **CONTINUOUS INTEGRATION** Started procurement cycle and POCs for tool needs such as secure GitHub and SFDX, resulting in purchase of AutoRABIT for Release Management, Component Review, Version Control, Eclipse and VS Code IDEs.
- **SANDBOX** created for testing, training, ramp up of new contractors.

BA / PM / SCRUM MASTER WORK:

- **ACCOUNT PLANNING** Analysis, requirements meetings and user stories to resolve problem of existing account planning structure. Extremely difficult because client chose not to consolidate processes across business units.
- **AGILE CADENCE** executed daily/ weekly included User Story Refinement, Backlog Grooming, Scrums (Daily Standups) Kanban Board, Sprint Planning, Road Map, Release Planning, Burn Down / Burn Up charts,
- **AGILE ESTIMATING** Used Story Point / T-Shirt Estimating.
- **AGILE PITFALL PREVENTION** Worked to prevent scope creep, undisciplined requirements gathering meetings, too many iterations, stories never completed, unqualified personnel**
- **AGILE SCRUM OF SCRUMS** Conducted early sessions and participated ongoing as Scrum Master with goal of coordinating work between four teams, minimize delays due to dependencies and scarce key people.
- **AGILE TEAM GUIDELINES,** Job Definitions, Procedures, Cadence defined, enforced best able.
- **AGILE TEAM SITE** Implemented **“Single Point of Truth”** project team site in SharePoint to ramp up 24 new contractors (**Contacts, calendar, policy, procedure, help sources, Agile standards, TFS How-To documentation**)
- **AGILE TOOLS, STANDARDS** Implemented TFS, Scope Management, Burn Up Charts, Kanban board, **USER STORY STANDARDS (INVEST.)**
- **BUDGETING** Created detailed budgets in Excel
- **CONSOLIDATION of MS CRM, SAP CRM, ORACLE CRM, other Salesforce orgs and home-grown CRM apps** to single Salesforce org, organizing this work into four AGILE teams was primary activity

- **DEVELOPMENT SCRUM MASTER** Led development team for Assets, Products, Customer Visit app / custom object development resulting in 40 user stories meeting acceptance criteria. Team produced excellent ERDs for custom development. Continuous improvement on documentation and coding standards.
- **ESCALATION** Formally escalated scope creep issue. Required competent people in all team positions and escalated team member competence problems resulting in removal.
- **GANTT CHART** planning, budgeting, estimating, prioritizing and scheduling of work for four AGILE teams using MS Project.
- **INTEGRATIONS SCRUM MASTER** Developed standard **Interface Checklist, Integration Master Schedule (TABLE by TABLE), Data Dictionary, Standard Field Maps**, master data model and formal Integration Definition Document to manage large integration risk. Did much of FIELD MAPPING work myself as example to less experienced team members.
- **PRODUCT/OPPORTUNITY/QUOTE** Major goal of Product custom dev team. Analysis and user stories toward ease of use for sales, minimum labor for accurate, quote approval.
- **PROGRAM MANAGEMENT** As first of 24 hired, built a cooperative, "client first" team of contractors from competing contractors with 12 commendations and thanks. Organized initial program of projects and teams then handed off to new program manager in order to focus on more technical / hands on roles.
- **REQUIREMENTS to USER STORIES** From 20+ requirements sessions **defined 150 User Stories into 15 Features for four teams, 40 stories taken through dev and acceptance criteria.**
- **STATUS REPORTS** Created detailed budgets and progress reports in Excel, PowerPoint.
- **TESTING JUMPSTART** Personally led and ramped up initial testing efforts because of vacancy. Included Unit Testing, UAT, and Test Driven Development emphasis.
- **USER STORIES INTO PRODUCTION:** Led on 40 stories through dev, testing, acceptance.
- **WIREFRAMES Screen Mock Ups, Wireframes, ERD, Test Scripts, Custom Object ERDS**, created, edited to help junior team members move forward quickly.

ADMIN, DECLARATIVE, CONFIGURE, NO CODE WORK: Configured/demoed/tested/implemented following:

- **PROFILE CONSOLIDATION** Analysis, requirements meetings toward consolidation of profiles, role hierarchy, permissions sets and sharing rules for eight acquired companies. Extremely difficult because client chose not to do process consolidation first.

DFWJLT, a Job Training, Job Leads Non-Profit Organization July 2017 to November 2017

Served as volunteer Salesforce Admin, Developer, Tester, Trainer for org standup and its ongoing mission to train people in Salesforce and help them rapidly find work in the DFW area. Included Microsoft CRM evaluation, Office 365/Sharepoint and Azure evaluation.

DEVELOPMENT / ARCHITECTURE WORK:

- **APEX DUPLICATE, INVALID DATA** Created RestrictContactByName class to reduce data problems.
- **APEX TEST COVERAGE** Numerous between 75% and 100%, required before deploy to production.
- **APEX TEST RECORD RANDOM GENERATOR** Factory class and test deletion class for Accounts.
- **APEX TRIGGER** for Account that matches Shipping Address Postal Code.
- **INTEGRATIONS** with Azure / Office 365 / SharePoint and SQL Server. Configured SharePoint as Connected App.
- **JAVASCRIPT** Developed temperature conversion app, trained on basics.
- **LICENSE COST REDUCTION** Able to use 10 user licenses to support 100 users by integrating Salesforce with SharePoint.
- **LIGHTNING APP** Complex app developed with custom objects, multiple record types and page layouts, advanced workflows for record creation when Opportunity Closed, Discount Approval, Scheduling, Deposit, Cancellation and refund. Includes Sales Processes (top bar progress bar).
- **SANDBOX** template setup, created, changes made in Sandbox, outbound change set created, deployed to production.
- **TOOLS USED** Developer Console, Development Mode Footer, Workbench, Schema Builder, Eclipse, VS Code, DataLoader.
- **VISUALFORCE** Convert page, case, screen to PDF
- **VISUALFORCE** File drag and drop, save on record.
- **VISUALFORCE** Override default list view behavior, show list of desired records with one click (Classic).
- **VISUALFORCE** Override Tab default with one click, display all records in "list view" mode.
- **VISUALFORCE** Quick edit forms for Account, Contact
- **VISUALFORCE** Quick Views: All contacts for account in table, quick edit all contacts.
- **VISUALFORCE** Reduced complexity of Classic screen and navigation for user by removing excess fields, related lists, creating Simplified Custom Tabs, enabling inline editing.

- VISUALFORCE, APEX APP DEVELOPED to Update Ship To with Bill To Address, Tabbed Accounts, Email Class Handler.
- VISUALFORCE, APP DEVELOPED to use Quick Edit Forms and Dependent Picklists to manager large picklists.

BA / PM / SCRUM MASTER WORK:

- **CRM CORE PROCESSES** from previous Microsoft projects organized, prepared for Salesforce use. Included sales activity, pipeline management, estimating, quoting, proposals, prototypes, data sheets, promo materials, price lists, sales forecast, credit management, big deal tracking, cross selling, qualifying leads, customer P&L, cost to serve, time capture, reseller management, support, materials, sites, customer self-service, self-ordering systems, complex contracts, hand-off to operations, mobile sales force.
- **SERVICE CLOUD CASE ESCALATION** Configured to resolve case and close.

ADMIN, DECLARATIVE, CONFIGURE NO CODE WORK: Configured/demoed/tested/implemented following:

- **3RD PARTY APPS (APP EXCHANGE)** installed for Dashboard for User Adoption, Work Orders, Dispatch, Estimating, Quoting, Service Reports, Parts Inventory, RMA, Technician Scheduling (Servicemax).
- **APPROVALS** If prospect over 500 employees email manager for approval before allowed to set Type=Customer.
- **BACKUP:** Data Loader used for backup.
- **CUSTOMIZATION, ADVANCED** Relabeled standard Case object as Help Requests, numerous custom fields to repurpose Accounts, Contacts. Custom Object Positive Negative Reports created. All deployed to production as custom Lighting App.
- **CUSTOMIZATION, COMPLEX CONFIGURATION** included custom fields, master detail lookups, validation rules, workflow, approval process, sales process, service process, record types, page layouts, related lists, tasks, activities, calendars, Cloud Scheduler. **WEB-TO-FORM.**
- **DAILY MAINT, SUPPORT, MISC** Troubleshoot profiles, access, security. Mass delete and mass transfer owner changes.
- **DATA IMPORT, EXPORT** Import / export from Salesforce Accounts, Contacts, Leads and Opportunities, including attached files to and from MS CRM and SharePoint. Tools: Data Import Wizard, Desktop Data Loader, Dataloader.io, SQL Server, SSIS, CSV files. Exported data to Excel, performed cleanup, re-imported to Salesforce.
- **DUPLICATE DATA DE-DUP, PREVENTION, CLEANUP, KEEP CLEAN.** Used Dunn's number as standard account identifier to prevent duplicate data.
- **EMAIL CAMPAIGN** created to track click-through rate resulted in 50% click throughs to a small group of targeted executives.
- **EMAIL OUTLOOK INTEGRATION,** Lightning for Outlook, Lightning Sync configured.
- **FLOWS** Quick Lead create to simply lead capture for sales people.
- **LIGHTNING FOR OUTLOOK (Lightning Sync)** configured and tested.
- **LIGHTNING MIGRATION** Lightning Console for Executive Opportunities Review, Forecast. Opportunities configured to help users deal with high volume of records.
- **LIST VIEW, REPORTING, DASHBOARDS** Measured User Adoption. Reports included Accounts with Cases and Contacts, Case Report, Cross Field Report, Matrix Report, All Accounts, Tradeshow Matrix Summary by Country. Filtering, Charts, report scheduling.
- **MARKETING CLOUD (partial).** Focused on Email Campaign click-through rate, resulted in 50% click throughs to a small group of targeted executives, automated as Leads.
- **MOBILE** User access to Salesforce including Global Actions, Mobile Admin access, Mobile (Compact) Page Layouts installed, configured. Optimized view for Accounts, works with iPhone, iPad.
- **MOBILE CASES** configured for quick entry.
- **MOBILE** Configured MyDomain to enable mobile device access.
- **PROCESS BUILDER** Auto update all Contact Addresses when Account Address is changed during Fulfillment process.
- **PROCESS BUILDER** Advanced workflows for record creation when Opportunity Closed, Discount Approval, Scheduling, Deposit, Cancellation and refund.
- **PROFILES, USERS, LICENSES, PERMISSIONS, ROLE HIERARCHY, CHATTER SUPPORTED:** 12 user licenses, expected to grow to 100 users. 15 total profiles. 20 roles configured, linked to profiles.
- **PROFILES, PERMISSIONS DEBUGGING** Numerous permissions, access problems resolved.
- **SALES CLOUD** Configured and deployed included Leads, Contacts, Accounts, Opportunities, Forecasts, Contracts, Solutions, Orders, Products, Price-books, Knowledge (Articles)
- **SALESFORCE ORG STANDUP** for three organizations (DFWJLT, TIA and ServiceMax trial).
- **SECURITY, ACCESS, PERMISSION SETS, SHARING RULES, PROFILES** Used two factor authentication and super-simplified App configuration to reduce number of profiles, permission sets, sharing complexity, user confusion, things to go wrong while maintaining security.
- **SERVICE CLOUD** Cases, Email To Case, Web to Case configured and tested

- **WORKFLOW** Configured to email account owner if rating set to Cold, log date and time of last email to account, set reminder for sales owner to follow up.
- **APPROVALS** Configured to approve New Account by email and TEXT.
- **KNOWLEDGE** Configured to correctly display relevant available articles and create new articles.
- **REPORTS, MATRIX** showing simplified pipeline, sum of Opportunities by Account only.
- **DATA LOADER** Imported data with complex table relationships / structures, difficult hidden data problems. Multiple import/exports required to clean up data and relationships between objects.

Exeter Auto Finance (Sub-Prime Lender), Salesforce, Related CRM, Provide Data to Field Sales (April 2017)

Led project as independent consultant to extract data from Salesforce through SQL Server/SSIS/SSRS to SharePoint for Field Sales / Customer Dashboard on iPad. 200 Salespeople supported.

- Goal was to provide customer data to 200 field sales people without purchasing 200 Salesforce licenses.
- **Phase 1 dashboard delivered in 10 days.**

Mitel (Telecom Hardware and Software Manufacturer), Salesforce and Microsoft CRM (Nov 2015 to April 2017)

Led project as independent consultant **CRM (Microsoft and Salesforce) and Migration Specialist. Also served as Agile Technical BA and Technical PM. Solutions included Azure, SharePoint 2003, 2010, 2013, SharePoint Online, Office 365.** SALESFORCE PROJECT GOAL: Create immediate custom solutions to U.S. Reseller Discount Management and Configure Price Quote for UK Services Change Orders, a \$10 million/year P&L. Additional projects for the Cloud and On-premise divisions included solutions for CONFIGURE PRICE QUOTE, SERVICE CLOUD, SALES KNOWLEDGE, COMMUNITIES, FILES, PRODUCT SUPPORT, PRICE BOOK, FIELD SERVICE Project Management, Wholesale Services, Americas, EMEA, Asia Pacific TERRITORIES, COMMISSIONS, MARKETING EMAIL CAMPAIGN with Reseller Click-through tracking. All Apps and Objects defined and documented to provide easy migration to Salesforce or other technology. **\$300,000/year in estimated savings.** ADOPTION SUCCESS: Received 50+ “thanks and well done” emails.

Other CRM Projects Of Note (Not Salesforce)

Crossmark (Medium-Large Business Services Firm), Two year nation-wide CRM / CPQ and Services project

Led project as **CRM / CPQ Specialist, Agile Technical BA, SharePoint No-Code Solutions Developer, Technical PM. Resulted in \$2.5 million per year in hard cost savings** for less than \$400,000. **\$10 million in additional sales per year because “easier to do business with”** (with SharePoint and Microsoft Technologies.) Work included improving field sales, field service, new products and Branch Administration. EXTENSIVE BEFORE AND AFTER PROCESS MAPPING, “STAPLE YOURSELF TO AN ORDER” concept, FIELD PROCESS COMPLIANCE was audited. 100 customer self-serve web sites with apps for customer self-ordering, RFQ / quote / proposal estimating / pricing / contracting, services costing, time sheets, customer P&L, new product authorization and introduction, customer service performance tracking, reconciliations management and sales activity tracking. INCLUDED FIELD SERVICE PROCESS OPTIMIZATION FOR 9,000+ EMPLOYEES. Included **CPQ (CONFIGURE PRICE QUOTE):** Reduced 97 step process to 49 steps for complex pricing and quoting of products, services, discounts and rebates. \$400 million of annual sales streamlined through this process.

Handleman (Large Business Services and Wholesale Distribution Company)

Role: CRM Specialist, Cloud Architect, Agile Technical BA, SharePoint, No-Code Solutions Developer. Led a 36 month CRM and Sales Leadership project resulting in \$6.5 million in new services sold in 30 small transactions and \$5.5 million in new services sold to Procter & Gamble. CRM apps included SALES ACTIVITY TRACKING, PROSPECT QUALIFICATION, SALES INCENTIVE MANAGEMENT, sales and account manager time tracking, extensive marketing material development and support on web sites, email marketing with click-through tracking, services costing, RFQ / quote / proposal estimating, project planning, PRICING and creation, extensive job definition, performance evaluation system, process mapping and use cases for service delivery system.

J.F. Shea, (a Home Builder and Mortgage Company)

Role: CRM Specialist, SharePoint 2010, 2013 Architect, Agile Technical BA, No-Code Solutions Developer. Led project which produced **ROADMAP AND STRATEGY** for a dozen+ Apps to be implemented resulting in \$2.75 million estimated cost savings per year. Apps included \$10 million+ Deal Tracking Workflow, 3rd Party Secure Document Exchange, SALES PIPELINE REPORTING, SALES FORECAST, Cash Forecast, Competitive Analysis, CPQ CONFIGURE, PRICE, QUOTE, FILES for Bid Estimates, RFP Submission and Workflow, COMMUNITIES, Web-to-Form App, MOBILE Apps, Executive Approval of Commissions.

Morrison, (Large Distributor of Plumbing Supplies), Credit Management

Role: Senior BA, solution architect for project which helped 35 person credit department grant credit to good customers faster and convert 1.3 Million pages to paperless system.

First Command Financial Services / Insurance Firm, CRM Project for Agency Sales Operations

Role: Supported project in CRM, Project Management, Expert Witness role. Apps included forecasting, product sales quota attainment, sales recruiting, training, compensation, performance evaluation, promotion, sales performance management, quoting, rating, underwriting data, agency office management, agent recruitment, agent training, agent compensation, complex retirement planning, estate planning, investment portfolio management. **\$3.5 million savings for client.** Special circumstances.

Texas Instruments, Collections

Led "bleeding edge" project which freed up \$5 million+ in cash from accounts receivable over 5 years. Project completed in 120 days.

Flowserve (Large Pump Manufacturer for Oil & Gas), Revenue Recognition, Sales Policy Compliance

Migrated \$12 billion revenue recognition database from Lotus Notes to SharePoint to provide better auditing, compliance.

Education, Certifications, Publications

- SALESFORCE PLATFORM DEVELOPER 1 Certification (95% complete)
- LIGHTNING EXPERIENCE SUPERBADGE
- LIGHTNING COMPONENT Development with JavaScript (in process)
- SALESFORCE ADMIN 201 Certification
- PMP Certification by Project Management Institute, 1994
- *Book: "How to Turn Computer Problems into Competitive Advantage"* published by PMI in 1998
- Peer Reviewed Journal Study on Improving Project Outcomes published by PMI in 1996. Numerous Articles, Case Study publications
- Electrical Engineering, minor work, B.S, Degree, Business, Iowa State University, 1997, prior to

Employment Chronology

Dec 2017-May 2020: Infosys, Salesforce Certified Technical Lead, Service Cloud Solution Architect, Senior Consultant, Technical BA, Integration, Agile, Lightning Specialist.

June 2013-Nov 2017: Independent Consulting / Contracting, Dallas, TX, Technical hands-on BA, PM, consulting. Became Salesforce Certified Administrator ADM 201 and Lightning Specialist.

2012-2013: Cognizant, Orange County, CA, Dallas, TX. Associate Director, Technical PM, BA, SharePoint Solution Architect, No-Code Developer.

2001-2012: Independent Consulting / Contracting, Dallas, TX. Roles included CRM, Field Service Specialist, Technical BA, Cloud Solutions, SharePoint No-Code Solutions Developer, Technical PM, Process Analyst

2000-01: Decision Consultants, Inc., Dallas, TX, Director of Delivery over 200 Consultants, Program Manager, Development Manager, Project Manager, Head of BA Group and Director of Delivery supervising 160 consultants. Hands-on BA and Dev Management roles.

1997-2000: Alliance Data Systems, (Credit Card Services, Deregulated Electricity and Gas Services) Dallas, TX. Technical Project Manager, Process Analyst, Senior Business Analyst roles.

1997, Prior To, Employers included **Xerox, IBM(spinnoff), Cambridge Technology Partners, Dunn and Bradstreet Software.**