

**Technical and Business Full Details, All Projects**

**Infosys**

**Dec 2017 to Present**

**Technical Lead, Salesforce Practice, Certified Administrator ADM 201, Lightning, Process Builder, Integration Specialist, Developer, Scrum Master, PM, BA**

**March 2018 to July 2018**

For Boeing Salesforce Project served as BA, Senior Project Manager, Integration/Migration Scrum Master, App Dev Scrum Master for Products, Assets, Custom Objects. Large project included 8 business units, 11 interfaces / migrations, 10 standard objects, 6 custom objects, 1000+ users. Work included field maps, data dictionary, screen wireframes, authoring 40+ User Stories, many through Acceptance Criteria, Testing. Implemented Agile standards, estimating. Helped organize Sandboxes, Change Sets to Production, Unit Testing, UAT, Architecture and Tools. First person hired to ramp up team of 24 contractors and organize project. Implemented SharePoint sites for project team, documentation. Implemented TFS for User Stories, Tasks, Scope / Change Management, Burn Up/Down Charts, Code Repository. Built cooperative, "client first" team of contractors from multiple sources. 10+ "thanks, well done, stay in touch" emails and texts. Included hands-on, prep, ramp up with Dataloader, SFDX, AutoRABIT, Dedup, Salesforce to Salesforce, Sandbox Change Sets to Production, APIs,

**SHORT SALESFORCE WORK SUMMARY:** Infosys advanced training in configuration, Lightning Experience, Process Builder, Visual Workflow, Approvals, Page Layouts, Standard, Custom Objects, Apps. Apex Triggers, Classes, Visualforce pages to improve user experience. Developer training for Ecommerce Storefronts, Product, Pricelists, Ordering, Interfaces. Also tabs, navigation, reports, dashboards, graphs, mobile app, Cases.

**MEDIUM SALESFORCE WORK SUMMARY: Infosys, December 2017 to Present (2 months) ROLE: Technical Lead, Certified Admin ADM 201, Configuration, Lightning, Process Builder, Developer.** Work Included LIGHTNING configure / develop, Process Builder, Visual Workflow, Approvals, Pages, Page Layouts, Standard, Custom Objects, Apps, custom record types, Sales Process. Advanced Workflows including Record creation, Discount Approval workflow, Scheduling, Fulfillment, Deposits, Cancel Order, Cancel Fulfillment. Page layouts including Case Quick Entry. Import, Clean up complex data. Tabs, Navigation, Reports, Graphs, Mobile App, MyDomain (custom url). DEVELOPMENT of Apex Triggers (shipping), Classes (email), Visualforce pages to IMPROVE USER EXPERIENCE e.g. Quick entry/edit forms, List Views, simplified screens, dependent (big) picklists, file drag/drop. Service Cloud Cases (Credit Limit, Order Correction, Invoice Correction, Returns) Knowledge, Dashboards, Reports, Mobile views. DEVELOPER TRAINING for CLOUD CRAZE MANAGED SOLUTION FOR B TO B ECOMMERCE: Configure / Development during training STOREFRONTS, PRODUCT, PRICELISTS, ORDERING, INTERFACES.

**\*\*\*DETAILED DESCRIPTION\*\*\***

**SALESFORCE WORK:**

- **LIGHTNING EXPERIENCE SPECIALIST:** Learned proficiency in Process Builder, Visual Workflow, Approvals, Workflow, Page Layouts, Standard, Custom Objects, App, custom record types, Advanced Workflow creating new record in custom object from data in standard objects. Sales Process customization (showing stages, fields and guidance for success), Discount Approval workflow, schedule service when approved, accept deposit, Cancel order, Cancel Fulfillment and clean up records, Quick Entry Form (Mobile) for Case Entry, Import Data with complex table relationships / structures / data problems, Lightning Experience Tabs, Navigation, Reports, Graphs, Mobile App, MyDomain (custom url).

- **DEVELOPMENT CERTIFICATION (20% complete).** Trained, developed, test Apex Triggers, Classes, Lightning and Visualforce pages including: Email Class, trigger for Account that matches Shipping Address Postal Code, Lightning, Visualforce customer pages to improve user experience: Quick entry/edit forms, List Views, simplified user screens, tabs instead of scroll down, dependent (big) picklists, file drag/drop, complex workflow, Approvals. Service Cloud Cases, Knowledge, Dashboards, Reports, Mobile views.

- **CLOUD CRAZE MANAGED SOLUTION FOR B TO B ECOMMERCE:** Attended Functional CONFIGURATION and Developer training for this Salesforce add-on package. Training systems included:

**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.

- **TEST DRIVEN DEVELOPMENT:** Studied, prepared this development method for use in Agile Kanban / User Story / Testing approach (used for CONFIGURATION ONLY and code development efforts.)

- **RELEASE MANAGEMENT WITH SFDX** (Salesforce Developer Experience) Integrated Dev Environments, Code Repository as “source of truth”.

## **DFWJLT, a Job Training, Job Leads Non-Profit Organization**

**July 2017 to Present**

**Salesforce Certified Administrator, Microsoft CRM Specialist, SharePoint, Azure Architect, Trainer**

**SHORT SALESFORCE WORK SUMMARY:** For a Non-Profit Organization, led implementation, configuration, customization for three Salesforce organizations. Configured users, licenses, profiles, security, access, permissions for 12 user licenses with 100 expected. Configured Sales Cloud, Marketing Cloud, Service Cloud Apps/Objects. Complex config / customization included Apex, VF pages for Accounts, Contacts, Help Requests, Positive Negative Reports, Workflows, REST/API, JavaScript, Sandbox.

**MEDIUM SALESFORCE WORK SUMMARY:** A Dallas Based Nonprofit Organization, May 2017 to December 2017 (6 Months) **ROLE:** Salesforce Certified Administrator ADM 201, Microsoft CRM, SharePoint, SQL Server, Salesforce Integration Specialist, Team Lead. **Work Included:** USERS, LICENSES, PROFILES for 12 user licenses, 100 expected. SECURITY, ACCESS, PERMISSION SETS, SHARING, SALESFORCE SYSTEM SETUP, CONFIGURE, ROLLOUT for three organizations. STANDARD APPS configured include Sales Cloud, Marketing Cloud and Service Cloud. STANDARD OBJECTS configured: Contacts, Accounts, Opportunities, Campaigns, Forecasts, Contracts, Service Cases, Solutions, Orders, Products, Price-books, Knowledge (Articles), Communities, LIGHTNING EXPERIENCE CUSTOM APPS / OBJECTS developed: DFWJLT app, Accounts, Contacts, Help Requests, Tests and Positive Negative Reports. 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, Minor customization with WEB-TO-FORM, REST / API, JavaScript, Force.com pages, APEX classes in process. SANDBOX, Change Sets, template setup, created, deployed. 3RD PARTY APPS (APP EXCHANGE): User Adoption, Work Orders, Dispatch, Estimating, Quoting, Service Reports, Parts Inventory, RMA, Technician Scheduling. MOBILE User access, (Compact) Page Layouts configured. CONSOLES, REPORTING, Dashboards created, customized. EMAIL OUTLOOK INTEGRATION, EMAIL CAMPAIGN created. Lightning for Outlook, Lightning Sync configured (not completed). DATA IMPORT, EXPORT, DUPLICATE PREVENTION, CLEANUP, KEEP CLEAN, BACKUP, mass delete, mass transfer owner changes using Data Import Wizard, Desktop Data Loader, Dataloader.io, SQL Server, SSIS, CSV files. Exported data to Excel, performed cleanup, re-imported to Salesforce.

### **\*\*\*DETAILED DESCRIPTION\*\*\***

## **DFWJLT (a Nonprofit)**

**May 2017 to Dec 2017**

**Salesforce Certified Administrator ADM 201, Microsoft CRM, SharePoint, SQL Server, Salesforce Integration Specialist, Team Lead.**

### **SALESFORCE WORK:**

- USERS, LICENSES, PROFILES, ROLE HIERARCHY, CHATTER SUPPORTED: 12 user licenses, expected to grow to 100 users. 15 total profiles. 20 roles configured, linked to profiles.
- SECURITY, ACCESS, PERMISSION SETS, SHARING: 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.
- ADOPTION: Key is make user's life better, solve immediate problems with MINIMUM CLICKS. Power User training and short video creation under way (as with my big Microsoft rollouts.)
- SALESFORCE SYSTEM SETUP, CONFIGURE, ROLLOUT for three organizations (DFWJLT, TIA and ServiceMax trial).
- PROCESS MAPPING, REQUIREMENTS defined for 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.

- STANDARD APPS configured and deployed include Sales Cloud, Marketing Cloud and Service Cloud.
- STANDARD OBJECTS configured and deployed included Leads, Contacts, Accounts, Opportunities, Campaigns, Forecasts, Contracts, Service Cases, Solutions, Orders, Products, Price-books, Knowledge (Articles), Communities, Solutions.
- LIGHTNING EXPERIENCE CUSTOM APPS and OBJECTS developed or modified include DFWJLT app, Accounts, Contacts, Help Requests, Tests and Positive Negative Reports.
- 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 customization in process. Minor customization with REST / API, JavaScript, Force.com pages, APEX classes in process.
- SANDBOX template setup, created, changes made in Sandbox, outbound change set created, deployed to production.
- 3<sup>RD</sup> PARTY APPS (APP EXCHANGE) installed for User Adoption, Work Orders, Dispatch, Estimating, Quoting, Service Reports, Parts Inventory, RMA, Technician Scheduling.
- MOBILE User access to Salesforce including Global Actions, Mobile Admin access to Salesforce, Mobile (Compact) Page Layouts installed, configured.
- CONSOLES created include Executive Review and Opportunities to help users deal with high volume of records.
- REPORTING, CUSTOMIZED, created include Accounts with Cases and Contacts, Case Report, Cross Field Report, Matrix Report, All Accounts, Tradeshow Matrix Summary by Country. Filtering, Charts, report scheduling.
- DASHBOARDS CREATED include User Adoption.
- EMAIL OUTLOOK INTEGRATION, EMAIL CAMPAIGN created to track click-through rate resulted in 50% click throughs to a small group of targeted executives. Lightning for Outlook, Lightning Sync configured.
- DATA IMPORT, EXPORT, DUPLICATE PREVENTION, CLEANUP, KEEP CLEAN, BACKUP: Built and tested export / import from Salesforce Accounts, Contacts, Leads and Opportunities, including attached files to and from MS CRM and SharePoint. Using Dunn's number as standard account identifier to prevent duplicate data. Tools included Data Import Wizard, Desktop Data Loader, SQL Server, SSIS, CSV files. Exported data to Excel, performed cleanup, re-imported to Salesforce. Mass delete and mass transfer owner changes. Data Loader used for backup.
- LICENSE COST REDUCTION: Able to use 10 user licenses to support 100 users by interfacing Salesforce with SharePoint.
- HORROR STORY PREVENTION: Documented a dozen+ CRM horror story implementations. Developed standard use cases, user stories, Agile scope containment, process maps, change documentation, release management, migration / integration planning, user testing, rollout. DOCUMENTED 16 MAJOR RISKS.

**CRM WORK:** As Salesforce Certified Administrator performed admin, support, configuration, custom app development, SharePoint integration, Office 365 and SQL Server integration. Trained job seekers and administered Sales Cloud, Service Cloud, Knowledge, Communities, Campaigns. REST/API, JavaScript, Visualforce, APEX development for Client-Side enhancements. Lightning for Outlook (Lightning Sync), Mobile Experience Page Layouts. Extensive Lightning User Interface work to pass Certification test and prepare clients for migration from Salesforce Classic to Lightning. Installed, configured 10 user non-profit license of Salesforce to assist network of IT job seekers with finding work. Provided Salesforce Admin training, SharePoint / Microsoft CRM training to job seekers to assist them in finding work, transitioning current technologies.

#### **TIA Hosting, a Cloud Service Provider, Part Time**

**August 2016 to August 2017**

**Salesforce Certified Administrator, Microsoft CRM Specialist, CRM Specialist for SharePoint, Office 365, Outlook Solutions, Integration with Salesforce, MS CRM, SQL Server**

**CRM WORK:** As Salesforce Certified Administrator trained on, configured and customized a Salesforce partner system by SERVICEMAX. Installed, tested and trained on MS CRM to evaluate as a practical solution. Tested, configured, integrated solutions from previous SharePoint / Office 365 CRM projects including sales activity, pipeline management, estimating, quoting, proposals, prototypes, trials, data sheets, success stories, 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 through hand-off to operations, mobile sales force, minimum

clicks, maximum buy-in. Performed admin, support, configuration, custom app development, integration, Export/Import, REST/API, JavaScript, Visualforce, APEX development for Client-Side enhancements. Integrated and tested with Microsoft CRM, SharePoint, Office 365 and SQL Server. Built and tested export / import from Salesforce Accounts, Contacts and Opportunities, including attached files to MS CRM for prospective client migration. Extensive Lightning user interface work to pass Certification test and prepare clients for migration from Salesforce Classic to Lightning.

**CRM IMPLEMENTATION PLANNING, HORROR STORY PREVENTION:** Studied and documented a dozen+ CRM horror story implementations. Developed standard use cases, user stories, Agile scope containment (limiting scope of feature/capabilities implemented at one time), process maps, change documentation, release management, rollback, backup, acquisition migration / integration planning, user testing, rollout, guaranteed adoption. Defined 16 MAJOR RISKS to prevent horror stories.

**MIGRATION WORK:** Migration and Upgrade of 8 GB Content Databases, SharePoint 2003 to 2010 to 2013. Single Server to Dual Server. Migrated thousands of user files into SharePoint. Migrated one major production application from TIA Hosting to Rackspace. Resolution of numerous errors and bugs to create a reliable standard migration protocol.

**ARCHITECTURE and TECHNICAL WORK:** Owned and operated private cloud, hosted SharePoint systems, dual server, on premise, to a dozen+ clients for rapid prototyping, development, test and production systems. VMware hosted development / production servers. jQuery, JavaScript, html, Designer, Dreamweaver, Muse Web Pages and conventional IIS web sites created. Installed and configured SHAREPOINT ONLINE / Office 365 to further support clients. Installed SharePoint 2016 (as VMware guest.) SharePoint 2003 was a simple hosted service, served well for early application / solution / prototyping. Skipped SharePoint 2007, installed SP 2010, two servers, MS Server 2008 and SQL 2008. Online backup used, no client data lost. Applied numerous operating system patches, SharePoint, SQL Server updates, resolved numerous critical technical problems. extensive clean up, consolidation of sites, site collections, web apps and content databases. Installed and configured numerous windows servers, 2012 R2 and 2016, VMware 6.0, SQL Server 2014, static IP address, numerous fully qualified domain names / URLs, Active Directory, VPN, backup, firewalls, port access, SharePoint 2010, 2013, 2016 Enterprise. Significant IIS configuration was necessary to provide both public facing sites and secure internal sites. Converted from Windows Classic Authentication to Claims Based.

**ADVANCED SHAREPOINT FEATURES, CONFIGURED, TESTED, AVAILABLE TO CLIENTS:** Anonymous Access / Public Facing Website, Extranet / Sharing, Visio Services, Excel Services, Extensive SP Designer Workflows, Extensive InfoPath Forms, Access Services 2013, BCS (Business Connectivity Services), ShareGate, Mobile Device support for iPhone, iPad, User Profile Synchronizer Service, Active Directory Synchronizer, SMTP Email Server.

**SQL SERVER, SSRS, SSIS, QUERY WORK:** Used SQL Server and related tools to create numerous interfaces between SharePoint and Data Warehouse, Data Marts. SQL Server CONTENT DATABASE MIGRATION: Backed up and migrated five content databases from the SP 2010 dual server environment to the SP 2013 dual server environment with no loss of data and most forms / workflows / solutions intact.

**BUSINESS ANALYSIS, AGILE WORK:** Developed AGILE KANBAN board, requirements and work management system using Visio Services and SharePoint lists, forms and workflows. Provided single point of truth for all requirements, tasks, activity, charge codes and labor cost accumulation, including color-coded auto refresh.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS:** Developed core apps used for numerous clients including action item tracking, "bugging email reminders", advanced HR action item management, advanced project management, advanced document create, modify, approved, publish, archive workflows, timesheets.

**BUSINESS RESULTS SUMMARY:** Provided private cloud, hosted SharePoint to a dozen+ clients. Rapid Results, clients able to build prototypes same day engagement agreement signed. Included all 2010 and 2013 advanced features. All sites, content databases, site collections and dozens of applications successfully upgraded and improved (with no loss of data) backed up and 100% client satisfaction with hosting service.

**TECHNICAL CHALLENGES OVERCOME:** Difficult migration of content from SP 2003 to SP 2010. SP 2010 REQUIRED THREE INSTALLS before becoming stable for five years. SHORTCUTS and IP ADDRESSES used instead of FULLY QUALIFIED DOMAIN NAMES contributed to one reinstall. ONLINE BACKUP required constant fixes but was reliable. SP 2010 and SQL 2008 DB random lockups, eventually resolved. Learned TRACE LOGS, EVENT LOGS, ULS VIEWER, DIAGNOSTIC LOGGING and CORRELATION IDs as diagnostic

tools. SP 2013 random lockups eventually resolved. FARM ADMINISTRATOR and permissions management complex, difficult and require workaround. Backup / Restore under difficulty with numerous errors but no loss of data.

**Aecom (a global Architecture, Engineering, Construction firm)**

**June to July 2017**

**Cloud Architect for Azure, SharePoint Architect for 2013, 2010 On Premise**

**ARCHITECTURE and TECHNICAL WORK:** Responsible for 13 server, two farm system supporting 19,000 users. Included 1700 Site Collections, 12 Servers, 4 Million Records, 17 TB of Data System was Unstable, Servers Dying, Search Not Working for 1/3 of all Sites, 120+ User Help Requests - No Way to Respond, A New Fire Every Other Day. Irrational Cheapness, Big Consequences, \$100,000+ of Revenue at Extreme Risk, Not Competitive with Alternatives (users could easily switch to SharePoint Online.)

**Exeter Finance (a Sub-prime Auto Lender)**

**May 2017**

**Salesforce CRM, Migration Specialist, Cloud Architect for Azure, SharePoint 2010, 2013, 2016, SharePoint Online, Office 365, Agile Technical BA, Technical PM, No-Code Solutions Developer**

**SHORT SALESFORCE WORK SUMMARY:** For a Consumer Finance company, led project to extract data from Salesforce through SQL Server/SSIS/SSRS to SharePoint for Field Sales / Customer Dashboard on iPad. 200 Salespeople supported, Sales Cloud, Contacts, Accounts, Opportunities. Custom: Loan Applications, Loan History, Defaults and Daily / Weekly / Quarterly Pricing. Phase 1 dashboard delivered in 10 days.

**MEDIUM SALESFORCE WORK SUMMARY: Dallas Based Consumer Finance, May 2017 (One Month):**

(Project cut short due to funding) **ROLE:** Salesforce CRM, Migration Specialist, Cloud Architect for Azure, SharePoint 2010, 2013, 2016, SharePoint Online, Office 365, No-Code Developer. **SALESFORCE PROJECT GOAL:** Extract data from Salesforce through SQL Server/SSIS/SSRS to SharePoint for Field Sales / Customer Dashboard on iPad. **Objective:** LICENSE COST savings of \$150,000 per year plus sales and customer satisfaction improvement. **USERS SUPPORTED:** 200 Salespeople (initial design.) **STANDARD APPS/OBJECTS** involved included Sales Cloud, Contacts, Accounts, Opportunities. **CUSTOM CONFIGURATION** objects to include Loan Applications, Loan History, Defaults and Daily / Weekly / Quarterly Pricing. Custom fields, master detail lookups, validation rules, workflow, approval process, record types, page layouts, related lists, tasks, activities to be configured as needed. Significant JavaScript menu system. Tools included Visio, Adobe Creative Cloud, Muse, PDF, Datasynch Studio. **MOBILE** Salesperson (iPad) access to Loan Applications, Loan History, Defaults and Daily / Weekly / Quarterly Pricing, while onsite with customer (dealer) was key outcome. Data export, import, duplicate prevention, cleanup. **PHASE ONE DASHBOARD CONFIGURED AND DELIVERED IN 10 DAYS.**

**\*\*\*FULL DETAILS\*\*\***

**SALESFORCE WORK:**

- SALESFORCE PROJECT GOAL: Create Dashboards for salespeople to have concise report of customer history on their iPads, saving an average of five hours per week per salesperson of sales time currently wasted in download / formatting / printing to prepare for sales calls.
- USERS SUPPORTED: 200 Salespeople (designed to support, project stopped due lack of funds.)
- ADOPTION: Key success with initial power user by giving her a simplified solution she could understand, support and meet CEO requirements with. Organization-wide adoption planned through "5 click maximum" approach, genuinely reducing time waste, complexity and confusion for sales person's day to day work with customers.
- LICENSE COST REDUCTION: Savings of \$150,000 per year expected by using SharePoint and SQL Server to create mobile dashboards instead of Salesforce.
- STANDARD APPS involved included Sales Cloud.
- STANDARD OBJECTS to be configured included Contacts, Accounts, Opportunities.
- CUSTOMIZATION, COMPLEX CONFIGURATION included custom objects Loan Applications, Loan History, Defaults and Daily / Weekly / Quarterly Pricing. Custom fields, master detail lookups, validation rules, workflow, approval process, record types, page layouts, related lists, tasks, activities as configured in Salesforce to be replicated in SharePoint dashboard with no adverse impact on production Salesforce. Significant Javascript menu system tested for alternate design.

- 3<sup>RD</sup> PARTY APPS used in dashboard tool set included Microsoft SQL Server, SSIS, SSRS Report Server, SharePoint, Visio, Adobe Creative Cloud, Muse, PDF, Datasynch Studio.  
- MOBILE Salesperson (iPad) access to Loan Applications, Loan History, Defaults and Daily / Weekly / Quarterly Pricing, while onsite with customer (dealer) was key outcome.  
- DATA EXPORT, IMPORT, DUPLICATE PREVENTION, CLEANUP: Key was use of Data Loader to export Loan Applications, Loan History, Defaults, Daily / Weekly / Quarterly Pricing, Contacts, Accounts and Opportunities from Salesforce to MS SQL Server using SSIS. Data reformat in SQL Server and exported with Datasynch Studio to SharePoint Dashboard. Initial load and nightly refresh in phase 1. Phase 2 goal was refresh 4x per day while preventing duplicates and keeping data clean.

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Consumer Finance company, led project to extract data from Salesforce through SQL Server/SSIS/SSRS to SharePoint for Field Sales / Customer Dashboard on iPad. Phase 1 dashboard delivered in 10 days.

**MIGRATION WORK:** Migration from SharePoint 2010 to SharePoint Online Office 365, including SharePoint 2016 Hybrid System project planned and began including Site Architecture, Standard Site Templates, 43 points of Governance for 1800 users and data migration planning. Planned as six month project.

**CLOUD / AZURE WORK:** Prepared architecture for Office 365, SharePoint Online rollout with Azure hosted or on-premise hybrid system for SharePoint 2016 with Power Pivot.

**ARCHITECTURE and TECHNICAL WORK:** Release 1.3 of CEO Dashboard, a fully functioning prototype, in place and used by CEO in 10 days. Consolidated the extensive, fragmented, difficult to find and use reports already existing in SSRS and Excel using SQL Server, SSRS, etc.

**SQL SERVER, SSRS, SSIS,** SQL Server Reporting Server, Power Pivot, Power BI, SharePoint 2016 solutions mapped out for dozens of huge Excel files to auto-refresh and present graphs in executive dashboard and to support future requirements.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS** included No-Code Solution to previously custom-coded SharePoint 2010 pages, Excel Services and Visio Services for Executive Dashboard auto-refresh.

**CRM WORK:** Built tool set for Salesforce.com export to dashboard for each customer, available on Mobile devices, saving hundreds of hours of sales time by preventing print jobs prior to customer calls. Release 3.0+ planned to solve this problem.

**BUSINESS RESULTS SUMMARY:** CEO Dashboard in place in 10 days. Data auto-refreshed by 6 a.m. instead of manual process delaying update to 11 a.m. (release 2.0, 3.0). Provided CEO with a "One-Click" path to key measures for business – no matter where information located in company. e.g. graph showing percent of first payments received within five days is best leading indicator of future defaults.

Project put on hold due to company-wide license cost of Office 365.

**Mitel (a Telecom Hardware and Software Manufacturer) November 2015 to April 2017**  
**CRM, Migration Specialist, Cloud Architect for Azure, SharePoint 2003, 2010, 2013, SharePoint Online, Office 365, No-Code Solution Developer, Agile Technical BA, Technical PM**

**SHORT SALESFORCE WORK SUMMARY:** For a Telecom Manufacturer, team lead and hands-on architect to create immediate custom solutions in Microsoft tools while waiting for Salesforce development. Apps built, delivered, documented for future migration to Salesforce for 5,000 casual users and 200 heavy users. Included Reseller Discounts, CPQ (Configure Price Quote) for UK Services, Change Orders, Service Cases, Knowledge, Communities, Files, Product Support, Price Book, Field Service, Commissions, Marketing Cloud Reseller Click-through tracking, Big Deal Tracking, Customer Self-service, numerous others. SPECTACULAR ADOPTION SUCCESS: Received 50+ "thanks and well done" emails, 5,000 total users.

**MEDIUM SALESFORCE WORK SUMMARY:** Telecom Manufacturer, Nov 2015 to April 2017 (19 months)  
ROLE: Salesforce CRM, Migration Specialist, Cloud Architect for Azure, SharePoint 2003, 2010, 2013, SharePoint Online, Office 365, No-Code Developer. Work included / SALESFORCE PROJECT GOAL: Led team to create immediate custom solutions to U.S. Reseller Discount Management App, CPQ (Configure Price Quote) App for UK Services Change Orders (a \$10 million/year P&L), Cloud Solutions CPQ app. Other priority

Apps included Service Cloud, Knowledge, Communities, Files, Product Support, Price Book, Field Service Project Management, Wholesale Services, Americas, EMEA, Asia Pacific Sales Knowledge, Communities Files, Territories, Commissions, Marketing Cloud Reseller Click-through tracking. Client preferred to develop many Apps in Salesforce but backlog required my team to provide immediate solutions in Microsoft / SharePoint / SQL Server while documenting and preparing the Apps for easy migration to Salesforce. USERS: 5,000 casual users were supported with advanced Apps implemented for daily use by 200+ users. LICENSE COST REDUCTION: \$300,000/year in estimated savings. SECURITY, ACCESS, PERMISSIONS, SHARING, some EXTREME SECURITY IMPLEMENTED. RIGOROUS HELP TICKET RESPONSE convinced users they would actually get quick help. USER STORIES, PROCESS, REQUIREMENTS for lead generation, sales activity, pipeline management, lead qualification, cross selling, configure, price, estimate, quoting, proposals, prototypes/demos, promo materials, data sheets, price lists, sales forecast, credit management, big deal tracking, customer P&L, cost to serve, time capture, reseller management, support, materials, sites, customer self-service, complex contracts, hand-off to operations. CUSTOMIZATION, COMPLEX CONFIGURATION for U.S. Reseller Discount management, CPQ UK Service Orders, included custom fields, master detail lookups, workflow, approval process, page layouts, related lists, tasks, activities, calendars. Additional customizations include Competitive Intelligence Custom Object, Cloud Scheduler with complex color coding, Service Cloud Red/Green/Yellow status dashboard, Service Cloud project status tracking roll-up with Red/Green/Yellow status dashboard and action item tracking due date reminder emails, custom email discussion group management with REST / API, JavaScript, jQuery. REPORTING, DASHBOARDS CUSTOMIZED moved toward paperless. EXTENSIVE DATA IMPORT, EXPORT, DUPLICATE PREVENTION, CLEANUP from Lotus Notes, Google, SharePoint apps. Apps tested/prototyped for INTERFACES from Oracle, Workday, SAP, SQL. SPECTACULAR ADOPTION SUCCESS: Received 50+ "thanks and well done" emails, 5,000 total users migrated and supported.

### \*\*\*FULL DETAILS\*\*\*

**MIGRATION WORK:** Migration to SharePoint Online (Office 365), Clean-up, Consolidation of SharePoint (twelve on-premise SharePoint servers, 2003, 2007, 2010, 2013, (400 GB), Google Sites (200 GB), Lotus Notes (1,000+ databases), three home-grown intranets and Network File Shares (500GB) for 5500 Global Employees. Extensive use of Metalogix, DocAve and ShareGate migration tools. Included some 200 complex Lotus Notes apps.

**CLOUD / AZURE WORK:** Migrated and consolidated all on premise and Google sites to Office 365, SharePoint Online. Single Sign On, Active Directory Federated Services, Exchange 2013, design for hybrid on-premise, SharePoint Online / Azure hosted advanced project management and financial reporting solution.

**ARCHITECTURE and TECHNICAL WORK:** Led project from basic Office 365 implementation with five SharePoint Site Collections to 50 site collections and 500+ sites. Extensive external sharing with third parties. Six advanced project management applications (PMO) with advanced scripts, integration to SAP, Work Day with SQL Server via SSIS, SSRS, Power BI, Flow, Power Apps, Excel Services, Visio Services for executive dashboards, Advanced InfoPath, Designer Workflows, Advanced document management workflows. Extensive Power User Training, 50+ advanced apps developed by power users. Data Warehouse, Data Mart Interface, Sugar CRM, Salesforce.com Migration Interface Designed. jQuery, JavaScript, html. Significant cosmetic overlay software challenges.

Converted multiple "Franken-Apps" to solid, documented, backed-up applications. Apps included color dashboards with link to detailed records. Prototyped Power BI, Flow, Power Apps, Excel Services, Visio Services and put dozens of apps in production for executive and other dashboards. Designed interface and requirements to migrate portions of CRM project from Sugar CRM and Salesforce.com to SharePoint.

**SQL SERVER, SSRS, SSIS, GET DATA FROM BIG SYSTEMS WORK:** Redesigned a fragmented, fragile, difficult to use project financial reporting and management system used to manage \$25 million+ in projects FROM a SQL Server, SSRS, SSIS, Project Server, Project Web Apps system to a stable, easy to use SharePoint Online, SQL Server SSRS, SSIS based system with estimated license cost saving and project outcomes improvement of \$2.5 million/year. Included interfaces to Oracle and SAP.

### **BUSINESS ANALYSIS, AGILE TOOLS USED:**

**AGILE SHORT SUMMARY:** For a Telecom Manufacturer, team lead and hands-on architect to migrate/consolidate custom solutions from 20 separate systems into Microsoft tools while waiting for Salesforce development. 65 User Stories, 15 Technical User Stories identified, defined, added to Kanban Board. 37 put

into production. Estimated cost and payback on hours/dollars resulting in \$2,750,000 in payback for less than \$1,000,000 in cost. Strong Product Owner engagement and strong team resulted in global adoption by 5,000 casual users and 200+ heavy users of the high value apps deployed. One Page Architecture / Process Outcomes map particularly helpful

Included Epics, User Stories, Product / Feature requests, Backlog, Product Owners, Kanban Board, Two Week Sprints, Informal Scrums, Budgeting based on Sprint capacity. User Stories in Kanban Board were estimated by days and Payback resulting in a Backlog totaling \$2,750,000 in payback for less than \$1,000,000 in total cost. Release planning used to prioritize, break into manageable Sprints. User Stories were linked to SharePoint Requirements Management and Test system and Migration Execution Protocol. Kanban Board was EXTREMELY HELPFUL in managing user demands. Conventional BA tools used included PROCESS MAPPING and extensive TECHNICAL DOCUMENTATION to help client become SELF-SUFFICIENT.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS, DEPARTMENT SOLUTIONS FOR:** R&D, Engineering, Sales, Pre-sales, Channel Support, Project Management, Operations, Quality Management, Professional Services, Product Management, Customer Service, Training, Competitive Intelligence, Marketing, HR, Legal, Finance, IT, Cloud, On Premise and Mobile Divisions.

**CRM WORK:** Client struggled to implement Salesforce.com, then Sugar CRM, then back to Salesforce.com. Did extensive mapping of 22 sales-related processes and basic analysis for moving significant portions of CRM to SharePoint. Most critical aspects were complex interfaces to dozens of internal systems such as Oracle and SAP for financial reporting.

- **IMPROVE PROJECT OUTCOMES (FOR CUSTOMERS and INTERNAL.)** Global Process, Project Improvement, Migration to Cloud for Mitel. Led 18 month project resulting in \$2.5 Million in EBITDA Improvement. E.g. a single project administrator is producing \$500,000 payback for UK based projects. Reduced project steps and waste by 30% in several cases. [Click for case](#)

\*\* IMPROVED PROJECT EXECUTION. A "Single Point of Truth" for all project documents. Shorter project cycle times, fewer costly mistakes and problems. Improvements in pricing-estimating-proposal-close cycle, standard project templates, documents, AGILE methods, consolidated reporting "roll up" of status, risk, issues, milestones, due dates.

\*\* IMPROVED FINANCIAL REPORTING, COST CONTROL, RESULTS: Project cost, budgeting, revenue, profit. Engineering defect tracking and resolution. White collar time capture, P&L per project. \$100,000+ reduction in project management software cost.

**BUSINESS RESULTS SUMMARY:** SharePoint Online acceptance is so strong, client is now decommissioning a dozen+ other legacy applications and migrating the apps to SharePoint Online. Savings to IT dept. between \$500,000 and \$1 million over 5 years. Applications and Sub-projects are identified and underway totaling approximately \$2,750,000 in payback from approximately \$1,000,000 in total cost. A single power user (Max) has completed a \$100,000 payback migration and is currently working on 15 more apps totally \$500,000+ 5-year payback. 30 other power users trained and developing similar solutions. License cost saving and project outcomes improvement of \$2.5 million/year identified on Mobile project management redesign. (Costs, paybacks, migration sizes are estimates. Project is ongoing.)

ADDITIONAL DETAILS: Strong user base, extensive Power User training, extensive video training and management support for advanced No-Code solutions resulted in hundreds of pages, workflows, forms and integrations for the departments listed above. Half dozen advanced project management and action items tracking applications put into production using advanced scripts. Included advanced integration with SAP, Work Day to import cost and time information into SQL Server via SSIS and summarize with SSRS and SharePoint for executive dashboards.

TECHNICAL ARCHITECTURE, DETAILS, CHALLENGES: Available for discussion. A notable challenge was the requirement from Marketing to use a "cosmetic overlay" on SharePoint to produce an attractive, custom look and feel. This overlay compromises advanced applications and numerous work-arounds are required.

Case study <http://www.tia4.tiainc.net/Public/TelecomHwrSwrCloudMobileMfrSuccessStory50MASTER.pdf> (password required)



**CRM, Migration Specialist, Cloud Architect for Azure, SharePoint 2013, SharePoint Online, Office 365, Migration and Consolidation of Old ERP to Cloud, Interfaces, Data Warehouse, Agile Technical BA, Technical PM**

**AGILE SHORT SUMMARY: Nov 2016 to April 2017:** For a Textile Manufacturer, led team for integration, update of two plant ERP systems to Cloud technologies. 106 User Stories, 18 Technical User Stories identified, partially defined, prepped for Kanban Board. Estimated cost of \$400,000 was too high. Project scaled back, taken in house. One Page Architecture / Process Outcomes helped.

**BUSINESS ANALYSIS, AGILE TOOLS USED** included User Stories, Product / Feature requests, Backlog, Product Owners, Kanban Board, Informal Sprints, Informal Scrums. Release planning used to prioritize, break into manageable Sprints. User Stories were linked to SharePoint Requirements Management and Test system. Conventional BA tools used included BUSINESS OUTCOME DEFINITION, ANALYSIS, PROCESS MAPPING and project cost budgeting. Project plan and budget showed \$500,000+ cost of project was more than owners were willing to spend.

**CLOUD / AZURE WORK:** Designed architecture for multiple nation-wide plants to consolidate to single Azure based ERP system with Azure hosted SQL Server Data Warehouse, integration with six cloud based B-to-B web sites including EDI and non-EDI automated order processing.

**MIGRATION, ARCHITECTURE, TECHNICAL, SQL SERVER, SSRS, SSIS WORK:** Integration, consolidation and update of two plant ERP systems from 25-year-old custom system and 15-year-old heavily modified package to current cloud-based solutions. Built prototypes with SQL SERVER, SSIS, SSRS, Datasynch studio, Data Warehouse, Data Mart, SharePoint 2013, jQuery, JavaScript, html to demonstrate solutions including migrating super-low-cost order entry system to current technology.

**CRM WORK:** Designed architecture, sites, process flows and interfaces to migrate / recreate a super-low-cost online order entry system for retailers from six B-to-B websites. Included catalog / price book through ordering, credit check, order transmission to ERP system for shipment. Removed EDI order transmission to reduce transaction costs and reduce new customer setup from weeks / months to a day or two.

**BUSINESS RESULTS SUMMARY:** By removing EDI setup delays and costs, \$4 million of orders per year remain profitable and new customers could order electronically in a day or two. (Critical element of design – not sure if implemented.) Used Earned Value project accounting and management to show private equity investors that project would cost \$500,000+, people were not completing assigned tasks and milestone goals were hopelessly optimistic. Project was scaled back and taken in-house.

**Frontier Telecom** **August 2015 to October 2015**  
**SharePoint 2013 Architect, Agile Technical BA, Technical Documenter, No-Code Developer**

**ARCHITECTURE and TECHNICAL WORK:** Clean up, consolidate, document architecture, servers, backup methods, accounts, passwords for three farms including 20+ servers. Determined Term Store problems due to 15,000 key words, old systems never cleaned up. Assisted with enormous merger integration problems affecting SharePoint use.

**BUSINESS ANALYSIS, SQL SERVER WORK:** Wrote SQL Server Queries, reports on “Who Using What” to help diagnose problems, ensure system working properly.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS:** Developed solutions with InfoPath and Quick Apps to manage change requests.

**OCI Chemical, Solar Division** **July 2015**  
**SharePoint 2013, Quick Response Power User Training, No-Code Solutions Workflow, Forms Developer**

**BUSINESS ANALYSIS, TRAINING WORK:** Conducted quick response training for 25 users including advanced keyword, managed metadata, archiving, search and information management policies. Received applause at end of two sessions.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS** included Engineering Project Tracking, Large Volume Image Management, Managed Metadata, Information Management Policies, Advanced Search.

## **Golden Spread Electric Utility**

**August 2014 to July 2015**

**Migration Specialist, Cloud Architect for Azure, SharePoint Online, Office 365, Agile Technical BA, Technical PM, No-Code Solutions Developer**

**AGILE SHORT SUMMARY: August 2014 to July 2015:** For an Electric Utility, as Scrum Master / Technical PM, led \$500,000 project to deploy Office 365/SharePoint Online company wide with advanced apps for HR, Legal, Operations, PMO. 69 User Stories, 19 Technical User Stories identified, defined, added to Kanban Board. 45 put into production. Estimated on hours. Strong Regression Testing. **FIRST AGILE SUCCESS** for company.

included Epics, User Stories, Product / Feature requests, Backlog, Product Owners, Kanban Board, Two Week Sprints, Informal Scrums. User Stories in Kanban Board were estimated with "T-shirt" method. User Stories were linked to SharePoint Requirements Management and Test system. Backlog of 100+ User Stories, Sprints of eight to 12 User Stories per Sprint. 50+ User Stories taken through to production use. Conventional BA tools used included USE CASES, SCREEN FLOW, PROCESS MAPPING and extensive TECHNICAL DOCUMENTATION, USER VIDEOS, system administration guides, user guides to help client become SELF-SUFFICIENT. Defined standard protocol for Office 365 user setup, reducing labor cost, delays, user frustration. Extensive USER PARTICIPATION, power user training and Level 1, 2 support for users contributed to **FIRST LARGE SCALE AGILE SUCCESS** for company.

**MIGRATION WORK:** Migration of network file shares, thousands of critical user files to SharePoint Online. Taught users self-sufficiency on migration, resulted in decommissioning of former company-wide "P: Drive".

**CLOUD / AZURE WORK:** Pilot (using on premise Active Directory / Exchange 2008) through full production roll out with OFFICE 365, EXCHANGE 2013, ACTIVE DIRECTORY FEDERATED SERVICES. Architecture, single sign-on (OKTA). Brought SharePoint into full production simultaneously with company-wide roll out of Office 365. Extensive testing, troubleshooting resulted in smooth production rollout.

**ARCHITECTURE and TECHNICAL WORK:** Led Agile / Iterative development project for Office 365, SharePoint Online, Initial Deployment, Company-wide. 100+ users, coded solutions with jQuery, JavaScript, html. Oversaw vendor development, \$500,000+ of vendor services. Personally developed 15 site collections and solutions for applications not provided by vendor. Cosmetic look and feel customization. Enforced rigorous TEST/DEV to PRODUCTION CODE and RELEASE MANAGEMENT discipline including TECHNICAL and user DOCUMENTATION for new features. Produced site map of all 40+ SharePoint sites. PERFORMANCE TESTING, feature test lab, standard look, feel, color palate and standard top level department site implemented. Mobile device support for all apps. Secure access for 3<sup>rd</sup> parties. POWERSHELL FOR SHAREPOINT ONLINE. Third party web parts. Limited MY SITES, SOCIAL FEATURES to avoid user confusion. Rigorous design and rework for ease of user NAVIGATION. Governance. Enforced naming conventions. MOBILE DEVICE SUPPORT for iPhone and iPad was provided out of the box by Nintex and InfoPath forms. Content by Search web part with jQuery, JavaScript used for HR PORTAL CAROUSEL.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS** developed per department included HR (employee portal, HR forms, Annual Benefit Elections, announcements, "ask the CEO", executive committee confidential communication.) Compliance / Regulatory / Risk (Issue Tracking, EPA, NERC, FERC, Safety, Lobbying, Review and Comment, et.al.) Legal (Legal Service Request, Contract Request, extreme diligence / oversight required due to legal vulnerability.) Administrative (company calendar, Board meeting scheduling, packet preparation, dissemination of confidential information, Senior Management Team scheduling, meeting minutes, Admin Service Request, Catering Request, Vehicle Fleet Maintenance, Check-in/Check-out. Field Operations (SCADA field asset inventory with off-line synchronization [when internet not available].) IT Department (PTO Request and Calendar, Intern Schedule Calendar, IT Project Documentation and Archival, User Training, User Aids, User Videos, FAQ.) Market Operations (Internal Rate and Schedule Publication.) Construction and Other Project Management (TIME SHEET SOLUTION WITH PROJECT COSTING, Class 1, 2 and 3 Project Management Solutions and compliance with PM standard methods.) Accounting (store and distribute accounting reports.) Member Services (store and distribute confidential member information.)

**TECHNICAL CHALLENGES:** Vendor approach using Publishing created numerous problems, found work arounds. Nintex workflows that were too complex and impractical. Extremely complex content by search queries worked when delivered, but were difficult to impossible to maintain. Resolved problems such as

instability of SharePoint Online, Designer workflow instability, users required to enter credentials numerous times, unable to save templates, site collection and sites disappearing / unavailable, conflicts with single sign-on software. SharePoint Online outages.

PROJECT MANAGEMENT TOOLS / DISCIPLINES: Planning and oversight through Agile, estimating, budgeting, staying within budget, project planning, scope management, change control, status reporting, vendor oversight, vendor interface. Project Online, Class 1,2,3, Project Management Solutions. See work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html#a3.30>

**BUSINESS RESULTS SUMMARY:** \$500,000 project, on-time, on-budget, user and executive management delighted, SharePoint adopted company-wide with a dozen power users continuing to build solutions. Employee portal widely used, reinforcing corporate values daily. 25+ applications put into production, being maintained and enhanced by power users. Other utilities have spent \$2 Million+ to accomplish similar projects.

**Golden Spread Electric Utility** **August 2014 to July 2015**  
**Migration Specialist, Cloud Architect for Azure, Agile Technical BA, Technical PM for Conventional IIS Website, Multi-server with Advanced Public Dashboard**

**AGILE SHORT SUMMARY: August 2014 to July 2015:** For an Electric Utility, as Scrum Master / Technical PM, led \$500,000 project to deploy a high-security IIS web with advanced graphics displaying real time electric power production. 28 User Stories, 13 Technical User Stories identified, defined, added to Kanban Board. 35 put into production. Estimated on hours. SECOND AGILE SUCCESS for company. Program Iteration, Release Plan, Scrum of Scrums conducted informally with other projects.

**MIGRATION WORK:** Migrated data from 20 year old SCADA (power control) system to Azure database with interface updating data every 15 minutes.

**CLOUD / AZURE WORK:** Installed / configured AZURE VIRTUAL HOSTING, MS Server 2012 on three servers, high availability with distributed data, SQL Server 2012, Virtual Network, Domain Name, RDP access, SSL, Cloud Service, IIS, Virtual IP, Static/Permanent IP, Public/Private Ports, Endpoints, Firewall, AZURE account and billing. A key element was the INTERFACE to an off-site SCADA (System Control and Data Acquisition) SQL DATABASE that monitored electric power generation. SCADA data was extremely sensitive and required a SECURE VPN TUNNEL connection to AZURE.

**ARCHITECTURE and TECHNICAL WORK:** Managed vendor and performed critical BA work, install / configure of three server Azure virtual environment. Develop conventional public website with confidential section displaying real-time power generation dashboard, responsive design for mobile devices. Azure hosting, SQL Server install, interface to, get data from 20 year old internal system. JQuery, javascript, html.

Updated the company to current website technology including responsive design for mobile devices, ease of update and executive dashboard showing real-time power generation. Solved problem that old website was so antiquated and difficult to update that company was losing credibility with external stakeholders. Received commendation for second large success precedent for Agile development. Overcame technical challenges due to Azure, SSO, interface to legacy SCADA system, slow performance. Enforced TEST/DEV to PRODUCTION CODE and RELEASE MANAGEMENT discipline. Primary development, done by the vendor, was in Kentico Web Site software with STAGING.

**BUSINESS ANALYSIS, AGILE TOOLS USED** included Epics, User Stories, Product / Feature requests, Backlog, Product Owners, Kanban Board, Two Week Sprints, Informal Scrums. User Stories in Kanban Board were estimated with "T-shirt" method. User Stories were linked to SharePoint Requirements Management and Test system. Backlog of 50+ User Stories, Sprints of six to 10 User Stories per Sprint. 30+ User Stories taken through to production use. Conventional BA tools used included USE CASES, PROCESS MAPPING and extensive TECHNICAL DOCUMENTATION, USER VIDEOS, system administration guides, user guides to help client become SELF-SUFFICIENT.

Vendor was BLOCKED on key specification for REAL-TIME POWER GENERATION DASHBOARD showing electric power generation over ¼ of the state of Texas. Personally created the SCREEN-FLOW WIREFRAME, PAPER PROTOTYPE and managed REVISION CYCLES to get vendor through the block. Advanced requirements included forms, email alerts, notifications and bill presentment. Vendor developed an outstanding dashboard and great team led to SECOND LARGE SCALE AGILE SUCCESS for company.

**RESPONSIVE DESIGN FOR MOBILE DEVICE, MULTIPLE BROWSER SUPPORT** including Chrome, Internet Explorer, Firefox, Mozilla and Safari. Primary devices were iPhone, iPad and Mac. Android was marginally supported. Vendor provided a strong solution. **TECHNICAL DOCUMENTATION:** Vendor's documentation was poor. Personally insisted on complete rework of documentation such that in-house employees could maintain the system.

**BUSINESS RESULTS SUMMARY:** \$500,000, project completed on time and on budget. Received commendations from executives on success of project and **SIGNIFICANT IMPROVEMENT** in how the company is perceived by external board members and customers. **EXTENSIVE SENIOR EXECUTIVE PARTICIPATION.** Large reduction in labor cost to maintain site resulted in site kept up to date (a critical requirement.)

**TECHNICAL CHALLENGES** overcome included complex AZURE domain, securing a **STATIC, PERMANENT IP ADDRESS** from AZURE, secure data access and **SINGLE SIGN-ON** (using OKTA SSO package). Conducted **PERFORMANCE TESTING** to diagnose slow response times. Initial SCADA database interface was difficult and repeated failures of five minute **DATA REFRESH** had to be overcome.

See work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html#a3.30>

**Graphic Solutions Group (a wholesale distributor) November 2014 to February 2015**  
**CRM Specialist, SharePoint 2013 Architect, Agile Technical BA, Technical PM, No-Code Solutions Developer**

**ARCHITECTURE and TECHNICAL WORK:** Installed, configured MS SERVER 2012 R2, VMWARE 5.8, and SQL SERVER 2012 dual server SharePoint 2013 Enterprise, configured **BACKUP, FIREWALLS, PORT ACCESS** and **GROUP POLICIES**. Configured IIS and **ALTERNATE ACCESS MAPPING**. Upgraded from SharePoint Foundation. Designed site hierarchy to maintain standard look and feel at department sites. **CUSTOM LOOK AND FEEL, ADVANCED GRAPHICS WITHOUT MODIFYING SHAREPOINT:** Used standard IIS website, Dreamweaver, Muse and html to provide very sophisticated top-level internal site, including a carousel using out-of-the-box configuration. **ADVANCED SHAREPOINT FEATURES** included Extranet / Sharing, Visio Services, Excel Services, SP Designer Workflows, InfoPath Forms, Mobile Device support for iPhone, iPad, User Profile Synch Service, Active Directory Synch, SMTP Email Server.

**SQL SERVER, SSRS, SSIS WORK:** Designed architecture to support extensive SSRS reports presented as IFRAME windows in SharePoint. Diagnosed **RESPONSE TIME PROBLEM** as SQL Server based.

**BUSINESS ANALYSIS, AGILE WORK:** Trained power users to enable them to complete many of the advanced applications without IT or consulting assistance. Defined numerous high value, No-Code solution applications.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS** identified, prepared for included Purchasing (procedure maps and vendor document workflow, capital equipment ordering). Operations (customer site preparation, install checklists, customer sign-off workflow and forms, service calendar, service on-site forms, checklists, installation certificates.) IT (standard operating procedures and forms workflow.) Executive (dashboards, key performance indicators and graphics.) HR (new hire on-boarding form and workflow, performance management system form and workflow, salary and compensation planning guide.) Excel services, Visio services dashboard and key performance indicator reporting.

**CRM WORK:** Identified, prepared for apps for Marketing (literature, workflow for 1000+ products allowing vendors to be responsible for maintaining their own literature.) Sales (customer on-boarding workflow, credit application and tax certificate workflow.)

**TECHNICAL CHALLENGES OVERCOME:** Numerous internal and external **FULLY QUALIFIED DOMAIN NAMES / URL** access problems. Severe **DOMAIN GROUP POLICY** problem required reinstall. Three cases and 20+ hours of **MICROSOFT SUPPORT** required to stabilize SharePoint. Other problems overcome included **IP ADDRESS CONFLICTS, USER PROFILE SYNCH SERVICE, ACTIVE DIRECTORY SYNCH, SEARCH SERVICE** and **EMAIL ALERTS**.

**BUSINESS RESULTS SUMMARY:** Upgraded client from SharePoint 2013 Foundation to Enterprise, resolved numerous problems, trained users and equipped them to implement numerous high-impact applications. Delays beyond my control resulted in project being placed on hold.

**SharePoint Migration, Architect, Troubleshooter**

**MIGRATION WORK:** Migration of dying, dysfunctional SharePoint 2013 system to new SP 2013 system.

**ARCHITECTURE and TECHNICAL WORK:** Small client needed help with numerous minor problems. SharePoint continued to decline and became unusable due to customization / install problems from previous vendor. Client authorized clean reinstall without the customizations. Reinstall included MS SERVER 2012, HYPERV, and SQL SERVER 2012 dual server SharePoint 2013 Enterprise. Cleanup of confusing navigation was a key requirement. Backups appeared to restore and we resolved numerous technical problems but both Microsoft and I could never fully recover all files and data. Client stopped paying for recovery efforts, stopped using SharePoint and went another direction. Client had paid a vendor to CUSTOMIZE SHAREPOINT without understanding the impact, discipline and oversight needed. Client was dazzled by cosmetics and appearance of PROJECT WEB APP, but having PWA installed in the same WEB APP as the production content contributed to our inability to recover 2/3 of the client's files. Client and previous vendor parted on bad terms resulting in no source code or documentation for maintaining the customization. Other significant problems included unstable HYPERV Virtual Servers, rogue back up jobs consuming all available disk space and Outlook instability. The client's unwillingness to pay for the full professional services they needed directly contributed to the negative outcome.

**Morrison Wholesale Distribution****April 2014 to August 2014****CRM, Migration Specialist, Cloud Architect for Azure, SharePoint Online, Agile Technical BA, No-Code Solutions Developer**

**AGILE SHORT SUMMARY: April 2014 to Aug 2014:** For a Wholesale Distribution Company, Agile BA, / architect role for project to make 35 person credit department paperless with SharePoint Online / Office 365. 32 User Stories, 8 Technical User Stories identified, defined, documented with test criteria and put into production. One Page Architecture / Process Outcomes helped. 1.3 Million pages become Paperless, average "Touches" reduced from 45 to 30, \$500,000 Savings from \$100,000 project cost.

**BUSINESS ANALYSIS, AGILE TOOLS USED** included informal use of Use Cases / User Stories, Product / Feature requests, Backlog, Informal Sprints, Informal Scrums. User Stories were linked to SharePoint Requirements Management and Test system. Backlog of 32 User Stories were taken through to production use. Conventional BA tools used included PROCESS MAPPING and extensive SYSTEM ADMIN DOCUMENTATION to help client become SELF-SUFFICIENT, executive and user credibility, scope / feature control, rigorous testing / rework / bug fix until right. Created a three year file volume estimate of 500,000 files, 600 GB of space and 1.3 million pages to confirm design. Provided admin, Level 1, 2 support and extensive user training. Rigorous design and rework for ease of user NAVIGATION. SECURITY, PERMISSIONS, GOVERNANCE. Screen flow, paper-based prototype. SELF-EVIDENT, SELF-DOCUMENTING DESIGN FOR USERS: Users required very little training or documentation to operate the system.

**CLOUD / AZURE WORK:** Early success at migrating very large paper-based system to SharePoint Online, Office 365. Worked through significant reliability and stability problems with cloud based SharePoint features. A major concern was the VALIDITY OF MICROSOFT'S CLAIMS (at the time) that millions of files and thousands of GB of data could be practically supported in SHAREPOINT ONLINE. Team investigated and conducted PERFORMANCE TESTING with 20,000 files, concluding risk was manageable for design (200,000) files per document library. Synched with Active Directory.

**ARCHITECTURE and TECHNICAL WORK:** Served as backup Architect and No-Code solution developer. Due to instability and newness of some SharePoint Online features (related to Content Types) developed alternate solution in case primary solution failed (in two weeks.) Created numerous lesser prototypes to validate solutions. Document Sets, Content Types, Auto-Archiving and overflow libraries (for very high volume) were among advanced features used. SEARCH, FIND DOCUMENTS EVEN IF SEPARATED FROM DOCUMENT SET: Design allowed easy retrieval while searching through 100,000+ documents. Metadata provided for easy retrieval, years later, even if document sets are separated or storage becomes fragmented. FUTURE SAVINGS designed to include auto-import of scanned pages, auto-import of external web site data, auto-setup of customer in ERP system and customer credit application self-service form.

WORK QUEUE DESIGN FOR 35 CREDIT PERSONNEL: "Queue" based work management was a critical requirement to deal with tens of thousands of pages assigned to users. In two days I created a prototype demonstrating queue based work management which became the ultimate solution. BEFORE PROCESS required average 20 pages printed and filed with 45 "manual touches." AFTER PROCESS required average 20 electronic pages with 30 or fewer "touches" over life of a credit app (estimated with client). EXTENSIVE EXECUTIVE and USER PARTICIPATION, POWER USER TRAINING led to a great project.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS** included advanced Credit and Collections Workflow, Process Improvement, with Document Sets and 3rd Party Auditor Access.

**CRM WORK:** Advanced credit management implemented included Customer Master Folder, Credit App, Credit Reference, Credit Report, Legal Entity, Tax Certificate, Job Data Sheets, Joint Check Agreement, Central Appraisal District, Mechanics Lien Contract, Bond, Consignment Agreement, Legal Notices and Waivers.

**BUSINESS RESULTS SUMMARY:** 1.3 Million pages become Paperless, average "Touches" reduced from 45 to 30, \$500,000 Savings from \$100,000 project cost. Completed early and substantially on budget in 5 months. (Estimates of benefits have been confirmed by the client VP and team lead.) Sales increased and risk managed by granting credit to good customers with less paper, less labor and easily processing requests for credit for new jobs. Prevented 30%+ cost overrun, delays and user frustration experienced on previous project through above disciplines.

See case study and work Samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html#a3.26>

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**Citizen's Business Bank**  
**SharePoint 2013 Architect**

**June 2014**

**ARCHITECTURE and TECHNICAL WORK:** Extensive Enterprise, Cross-Site Collection Search Configuration with Custom Filters and Managed Metadata. Solution included better use of preferences and advanced options in search center, metadata navigation per document library, custom search results page, content search web part and Enterprise search for cross site collection search. Discovered quick hit solution to cross site collection search, saving three weeks of consulting time for full Enterprise search implementation.

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**Pacific Union Mortgage**

**December 2013 to February 2014**

**CRM, Migration Specialist, SharePoint 2013 Architect, Agile Technical BA, Technical PM**

**MIGRATION WORK:** Six TERRABYTE User File Migration, prepared for and trained. SAVED USER FOLDER NAMES AS METADATA, attached to files, migrated to SharePoint. CUT USER LABOR TO MIGRATE LARGE AMOUNTS OF FILES BY 90% using ShareGate.

**ARCHITECTURE and TECHNICAL WORK:** In 90 Days, with seven servers, SharePoint 2013 architecture designed, configured, implemented. Included dev and test systems. 31 Content Databases, 200 GB each. MS SERVER 2012, VMWARE 5, and SQL SERVER 2008 and 2012. BACKUP, FIREWALLS, PORT ACCESS and GROUP POLICIES. IIS and ALTERNATE ACCESS MAPPING to provide a "FRIENDLY URL" to users. Designed for standard look, no custom code, support for extensive SSRS, Excel services, Visio services, Designer workflows, InfoPath Forms, BCS access to SQL Server. GOVERNANCE, RESPONSE TIME TESTING and resolution, NAVIGATION rework for ease of use. Kerberos, Classic Windows and Claims-Based Authentication. CITRIX user workstations. "RUNBOOK", FULL DOCUMENTATION INSTALL.

**SQL SERVER, SSRS, SSIS WORK:** "WHO USING WHAT" SQL QUERY: Created this query to meet a deficiency in SharePoint's reporting. Needed to confirm that the new system was actually being used and users were migrating their file shares to SharePoint as directed.

**BUSINESS ANALYSIS, AGILE WORK:** 50 SharePoint Power Users trained (live and video).

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS** identified / built and architecture designed for Operations / Underwriting (Lending Authority Authorizations and Risk Management, Exception and Defect Handling.) Compliance (CFPB and Other Audit Compliance and Remediation.) HR (On-boarding, Off-boarding, Recruiting, Benefits Admin, Training.) IT PROJECT DASHBOARD and MANAGEMENT FRAMEWORK: Created templates for Process Flow, helping Business Executives CHANGE PRIORITIES WITHOUT

DISRUPTING CURRENT PROJECTS, Progress and Status Reporting, Time Capture with COSTING and CHARGEBACK TO BUSINESS UNIT, additional PM tools.

**CRM WORK:** Designed architecture to support rapid development of Sales / Marketing / Wholesale / Correspondent (Product Repricing, Average Price of Record, Wholesale Client Database) apps. Began requirements and specifications for these apps.

**BUSINESS RESULTS SUMMARY:** Team received numerous commendations for “on-time, on-budget, happy user” roll-out. Cut user labor to migrate files by 90%.

See case study and work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html#a3.25> item 3.25

**J.F. Shea, (a Home Builder and Mortgage Company) October 2013 to December 2013**  
**CRM Specialist, SharePoint 2010, 2013 Architect, Agile Technical BA, No-Code Solutions Developer**

**MEDIUM SALESFORCE WORK SUMMARY:** California Based Homebuilder, Oct 2013 to Dec 2013 (3 Months)  
ROLE: CRM Specialist, SharePoint 2010, 2013 Architect, No-Code Developer. Work included / SALESFORCE PROJECT GOAL: Document need, ROI, evaluate Apps and create ROADMAP for development in Salesforce or alternate technology. Apps included \$10 million+ Deal Tracking Workflow, Communities, 3rd Party Secure Document Exchange for Customers, Consultants, Architects, Engineers, Lawyers, Dealmakers, Commissions, Sales Pipeline Reporting, Sales Forecast, Cash Forecast, Competitive Analysis, Expense Reporting and Approvals, CPQ Configure, Price, Quote Community and Files for Bid Estimates, Worksheets, Letter Of Intent, RFP Submission and Workflow, Communities for Customer emails, notes, documents, voice mails, self service and self ordering, Buyer Satisfaction workflow. Client struggled to implement Salesforce. SharePoint and related Microsoft technologies used as interim solutions. 200+ users benefited from immediate access to Apps and solutions. EXTREME SECURITY, ACCESS, PERMISSIONS. 3RD PARTY APPS: A Web-to-Form App AT NO LICENSE COST. MOBILE Apps included Department Calendar, Executive Approval of Forecasts, Executive Approval of Commissions. \$2.75 MILLION ESTIMATED COST SAVINGS per year.

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a California based Homebuilder, developed and deployed an HR Personnel Action system in two weeks to demonstrate rapid development, show that \$2.75 million estimated cost savings per year were possible.

\*\*\*FULL DETAILS\*\*\*

**ARCHITECTURE and TECHNICAL WORK:** Hired to conduct SharePoint Strategy Review of 1200 employees, 20 Senior execs, 20 business units, 15 locations. Documented and recommended strategy and best practices for all aspects of SharePoint including architecture, infrastructure, hierarchy, file sharing, search, advanced workflow, forms, extranet, scanning, other advanced applications. MS SERVER 2008, VMWARE, and SQL SERVER 2008, SharePoint 2010 Enterprise and SAN storage. BANDWIDTH / NETWORK CAPACITY review. SITE HIERARCHY and NAVIGATION were too complex for users, recommended simpler design. GOVERNANCE. CONTENT DATABASE BACKUPS greater than 200 GB were a concern. FBA (FORMS BASED AUTHENTICATION) for external vendor app. EVALUATION OF SHAREPOINT 2013, COST TO UPGRADE.

**BUSINESS ANALYSIS, AGILE WORK:** Extensive weekly “Lunch & Learn” training for 60 power users. Resolution of Level 2 and Level 3 support problems. CAPITAL ACQUISITION WORKFLOW FOR \$10 MILLION+ DEALS: Mapped process and created rigorous workflow and form documentation to automate the current manual process.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS** included PERSONNEL ACTION FORM WITH ADVANCED WORKFLOW: Advanced InfoPath form with Designer workflow to meet immediate HR need to replace paper-based system and teach Power Users how to create advanced applications. See Case Study for 90 other applications identified.

**CRM WORK:** Apps documented and payback estimated included weekly sales activity report, Competitor analysis database, sales forecast, mobile sign-off for big commission approval, bid estimating worksheets, commissions, web site making it easy for new customers to buy. Prepared for rapid development of these apps.

**CRM IMPLEMENTATION PLANNING, HORROR STORY PREVENTION:** With CIO, documented details of \$1 million spent on Salesforce with no tangible results. Prepared integration with Salesforce and possible replacement of Salesforce with SharePoint / Outlook Exchange / MS Office solution.

**BUSINESS RESULTS SUMMARY:** Produced ROADMAP AND STRATEGY for 93 projects with \$2.75 million estimated cost savings per year. 68 of the projects were specified as No-Code Solutions resulting in extreme cost savings and rapid completion (vs. conventional IT solutions).

See case study and work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html#a3.24> item 3.24

**Caliber Mortgage** **June 2013 to September 2013**  
**Migration Specialist for SharePoint 2010 / 2013, Agile Technical BA, No Code Solution Developer**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Mortgage company, deployed a system in 60 days which reduced a process from 153 steps to 89 steps. "TOUCHES" reduced from 40 per case to 15 per case.

**MIGRATION WORK:** Clean Up, Consolidate, Prepare Migration to 2013. Documented SITE HIERARCHY for SP 2007 and SP 2010 and MAPPED MIGRATION to new SP 2013 environment.

**ARCHITECTURE and TECHNICAL WORK:** 2500 Users. Numerous systems supported, improved, fixed and documented. URL / Path / Workflow problem correction. Minor work with DOCAVE. Consolidation of sites, rebranding, INTERFACE DOCUMENTATION. MS SERVER 2008, VMWARE, and SQL SERVER 2008, SharePoint 2007 and 2010 Enterprise were installed and operating on five servers in large scale production. Prepared for new SP 2013 farm with four servers. GOVERNANCE. Created TEST/DEV ENVIRONMENT to avoid disrupting production use.

**SQL SERVER, SSRS, SSIS WORK:** ADVANCED SQL LOOK UP, INTERFACE TO FISERV LEGACY SYSTEM FOR COMPLAINTS TRACKING with 200,000 LIST ITEMS. SQL Server Interface to Data Warehouse, Data Mart synchronized with Data Synch Studio.

**BUSINESS ANALYSIS, AGILE WORK:** Regulated Letter Administration system processes mapped, documented, built and implemented in 30 days. CFPB Readiness Audits app finalized, extended and supported., Complaint Handling system with complex SQL lookup improved and supported. Extensive VIDEO TRAINING for users. Extensive USE CASES, TEST SCRIPTS and DOCUMENTATION.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS:** REDUCED 153 STEP LETTER GENERATION PROCESS TO 89. Simplified and enhanced a CFPB AUDIT APPLICATION. Other apps included Compliance (Consumer Finance Protection Bureau Audit, GSE Approval.) Operations (Complaint Handling, Call Monitoring Scorecards, Transaction Management, Mailroom.) Legal (Letter Administration.) Foreclosure (Bankruptcy Audit, Foreclosure Referrals, Affidavit Review, Default, Foreclosure Documentation Review, Bankruptcy.) HR (Onboarding New Employees.) Accounting (Collections Referral, Collections.) IT (IT Help Ticket, IT Other, IT PMO Change Control.) Marketing / Sales (Short Sale Pipeline, Incentive Compensation Program.) Minor work with NINTEX.

**BUSINESS RESULTS SUMMARY:** Numerous process improvements, e.g. reduced a process from 153 steps to 89 steps. "TOUCHES" reduced from 40 PER LETTER to 15 PER LETTER. \$1,000,000 UPGRADE OF LEGACY SYSTEM DEFERRED for multiple years using SharePoint workarounds. (Estimated.)

See work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html#a3.16> item 3.16

**Hyundai Motors** **December 2012 to February 2013**  
**Cloud, SharePoint 2010 Architect, Agile Technical BA**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For Hyundai, completed Roadmap, requirements, specifications in six weeks. Saved client \$100,000+ by creating prototype in two weeks, preventing vendor over-charge.

**CLOUD / AZURE WORK:** Used cloud based SharePoint 2010 system to build rapid prototype, prove vendor was over charging for on-premise proposed system.



**ARCHITECTURE and TECHNICAL WORK:** Built Prototype in two weeks to demonstrate solution with reduced complexity, keep vendor from over charging client.

**BUSINESS ANALYSIS WORK:** Led detailed SharePoint requirements project for purchasing, state tax, federal tax, sales promotion, digital asset management departments. Wrote plan, Roadmap for nation-wide expansion of SharePoint.

**BUSINESS RESULTS SUMMARY:** Completed on schedule. Saved client \$100,000+ by creating prototype with significant reduction in complexity, preventing vendor over-charge.

See work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html#a3.17> item 3.17

**Responsive Education, (a Charter Public School Provider)** **November 2012**  
**SharePoint 2007 Migration Specialist, Troubleshooter**

**MIGRATION WORK:** Conducted SharePoint 2007 “cleanup” to resolve response time and user satisfaction problems in preparation for 2010 / 2013 migration. Migration of 112,000+ files to clean site collections.

**ARCHITECTURE, SQL SERVER and TECHNICAL WORK:** Consolidation of 25 site collections to six resulted in 400% improvement in response time. Improved stability, user navigation, user satisfaction.

**Ettinger Rosini (a Manufacturer's Rep)** **May 2012 to November 2012**  
**CRM Specialist, Cloud Architect for SharePoint 2010 Agile Technical BA, No-Code Solution Developer**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Manufacturer’s Rep, built a “big sale tracking” solution and sales pipeline in 30 days.

**CLOUD / AZURE WORK:** Built rapid prototype, solution for client with SharePoint cloud service to move ahead quickly, without waiting for on-premise solution.

**SQL SERVER, SSRS, SSIS WORK:** Built complex solution requiring parent-child database and SSRS reports. Data Warehouse, Data Mart Interface.

**CRM WORK:** Process map, requirements, initial prototype for complex “big sale tracking” solution developed in one week. Full prototype to manage pipeline of projects and sales developed in 30 days.

**Vista Machining** **January 2012 to December 2012**  
**CRM, Migration Specialist, Cloud Architect for SharePoint 2010, Agile Technical BA, No-Code Solutions Developer, Technical PM**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Machining firm, deployed production apps for Sales leads, sales activity tracking, RFQ to close tracking, P.O. to ship procurement tracking workflow in 90 days.

**BUSINESS ANALYSIS, AGILE WORK:** As-Is and To-Be CRM and Operations processes mapped. Iterative requirements and development.

**CRM WORK:** Designed, built and brought into production apps for Sales leads, sales activity tracking, RFQ to close tracking, P.O. to ship procurement tracking workflow developed in 90 days for minimal cost.

**City of Kennedale, Texas** **May 2012 to June 2012**  
**Cloud Architect for SharePoint 2010, Agile Technical BA, No-Code Solutions Developer**

**CLOUD / AZURE WORK:** Built rapid prototype, solution for client with SharePoint cloud service to move ahead quickly, without waiting for on-premise solution.

**BUSINESS ANALYSIS, AGILE WORK:** Process mapping, iterative requirements created for paperless workflow goal for multiple departments.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS:** Prototype (rough) developed in 30 days for moving to PAPERLESS OFFICE for city departments. Primary goal was a SharePoint system to ATTACH SCANNED DOCUMENTS to city government legacy software for Courts. DIGITAL SIGNATURE. Apps included Finance, Budgeting, Council briefing book preparation, Records and Public Works Citizen Request Action Item Tracking.

**Ruhrpumpen (a manufacturer)**

**June 2012 to July 2012**

**Cloud Architect for SharePoint 2010, Agile Technical BA, No-Code Solution Developer, Technical PM**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Manufacturer, built system to reduce an 81 step process to 46 steps, greatly reducing serious Quality problem in 60 days.

**BUSINESS ANALYSIS, AGILE WORK:** 81 Step quality process reduced to 46 steps. Extremely complex manual Quality / Non-conforming Materials processes, mapped As-Is, designed To-Be, requirements defined, Agile, Iterative development. **QUICK HIT PROCESS BENEFITS:** Team determined that much of needed improvement could be made by returning to former manual form and process, deferring the need for the electronic form solution. Team identified six process changes, made immediately and monitored weekly that could solve numerous problems.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS:** Workflow, forms and advanced SharePoint application developed within 60 days. Electronic form for Quality Problem and Customer Service (RMA) created in 10 days.

**Flowserve (a manufacturer)**

**January 2010 to April 2012**

**CRM, Migration Specialist, Cloud Architect for SharePoint 2010, Agile Technical BA, No-Code Solutions Developer, Technical PM**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Manufacturer, built an extremely complex prototype for SOX solution, production ready in 90 days. Full solution developed and in production 60 days later. Managed 12 releases of software with extensive documentation and testing. Replaced a dysfunctional \$750,000 system and produced \$1.7 million in five-year estimated savings from \$100,000 project cost.

**MIGRATION WORK:** Migrated one major production application from TIA Hosting to Rackspace. Migrated \$12 billion revenue recognition application from Lotus Notes to SharePoint. Developed interface and solution to filter 6,000 item Daily Project Status report in BAAN just 40 relevant action items in SharePoint.

**CLOUD / AZURE WORK:** Configured and installed three SharePoint 2010 cloud-based environments for client, including Rackspace and TIA hosting service. Configured cloud based site collection backup, in addition to cloud based SQL Server backup, as extra layer of backup for mission critical application. Confirmed cloud providers met SAS 70 type i and type ii security standards. Worked through numerous issues of IP addresses, port access, SSL configuration, user sign-in, password reset with FORMS based authentication.

**ARCHITECTURE and TECHNICAL WORK:** Designed and implemented complex world-wide SOX compliance system for 120 locations. Conducted concurrent development in SharePoint and IIS/ASP.NET / SQL Server to provide extremely fast, efficient code as alternative option. SharePoint prototype production ready in 90 days. Rewritten in IIS / ASP.NET / SQL Server (28 tables) production ready in 60 days. Rigorous evaluation of SharePoint 2007 and 2010, created a 140 item testing protocol. Concluded 2010 was stable. Configurations were SharePoint 2010 Enterprise, SQL Server 2008, dual server configuration with MS Server 2008. Secure access for 3<sup>rd</sup> party auditors. Bamboo FORMS BASED AUTHENTICATION with Active Directory. LIMITED NUMEROUS FEATURES to avoid user confusion. SECURITY, PERMISSIONS, GOVERNANCE (complying with European Union law.) Extensive PERFORMANCE TESTING. TEST/DEV to PRODUCTION CODE and RELEASE MANAGEMENT discipline. Designed IIS / ASP.NET / SQL ultimate solution to run on SharePoint servers with \$0 INCREMENTAL SOFTWARE COST. FRIENDLY URLs and DOMAIN NAMES. Operating system, SharePoint updates, firewall and port level security management. SOX APPLICATION required extensive DASHBOARD to MONITOR COMPLIANCE processing of thousands of documents at 120 sites. Critical requirements were due dates, reminder, completion tracking and EARLY WARNING OF POSSIBLE SOX MATERIAL WEAKNESSES. SHAREPOINT OBJECT MODEL CUSTOMIZATION: Discovered bug in SharePoint audit trail, produced minor modification to SharePoint in Visual Studio. Solution was stable, but

client elected not to modify SharePoint. MOBILE DEVICE SUPPORT out of the box. BCS (BUSINESS CONNECTIVITY SERVICES), SHAREPOINT TO SQL SERVER 2008 prototype dashboard created.

**SQL SERVER, SSRS, SSIS WORK:** SSRS was used as a “rapid first cut” prototype for reports that ultimately became the custom dashboard in ASP.NET. Designed Data Warehouse, Data Mart Interface for accounting transaction reconciliation. Wrote “Who Using What?” SQL QUERIES to confirm users actually using the new system.

**BUSINESS ANALYSIS, AGILE WORK:** Informal AGILE / Iterative development. Extensive PROCESS MAPPING, USE CASES, REQUIREMENTS DEFINITION, SCREEN FLOW, PAPER-BASED PROTOTYPE documentation became DEVELOPMENT SPECIFICATION, TESTING and RELEASE MANAGEMENT DOCUMENT. Extensive testing, user documentation, user training, user videos, Level 1 and 2 support necessary due to world-wide implementation, language differences and time zones.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS:** Built extremely complex prototype for SOX solution in InfoPath and demonstrated PRODUCTION READY IN 90 DAYS. Converted \$12 billion revenue recognition application from Lotus Notes to SharePoint in 90 days. 6,000 line BAAN Daily Report Consolidated to 40 Relevant Items in 21 days, Numerous other prototypes. Replaced 100+ Excel spreadsheets with SharePoint apps.

**CRM WORK:** Defined requirements, processes, interface for complex Engineered to Order Sales organization including sales activity, pipeline management, estimating, quoting, proposals, prototypes, trials, data sheets, success stories, 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 through hand-off to operations, mobile sales force, minimum clicks, maximum buy-in.

**BUSINESS RESULTS SUMMARY:** \$1.7 million five-year estimated savings from \$100,000 SOX Compliance project. Replaced dysfunctional \$750,000 system. Client executives delighted with extreme improvement in reporting and control of SOX compliance, including prevention of material weakness disclosures (the key desired outcome.) Numerous other projects prototyped, continued by others.

**PROJECT MANAGEMENT TOOLS / DISCIPLINES:** AGILE / Iterative development, estimating, budgeting, staying within budget, project planning, scope management, change control, status reporting, vendor RFP, contract management, oversight, vendor interface. See case study, screen shots, work samples: <http://www.tia4.tiainc.net/Public/No35bitAudienceSucStryLrgMfrExcelProbemShPt.pdf>

#### Level 2 Design (B to B services)

**March 2010 to July 2010**

**Agile Technical BA, SharePoint No-Code Solutions Developer, Technical PM**

**CLOUD / AZURE WORK:** Built rapid prototype, solution for client with SharePoint cloud service to move ahead quickly, without waiting for on-premise solution.

**BUSINESS ANALYSIS:** MAPPED PROCESSES, designed, created RFP for software company bids. Applications: Professional services estimating, project planning, quoting, sourcing, PO authorization, scheduling, change order capture and client billing system.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS** prototyped for Advanced Purchasing, Scheduling System.

#### Handleman subsidiary, (B to B services),

**October 2007 to April 2010**

**CRM Specialist, Cloud Architect, Agile Technical BA, SharePoint, No-Code Solutions Developer**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Wholesale Distribution Company, built and deployed system for Sales Activity Tracking, Prospect Qualification, Incentive Management, Time Tracking, Services Costing, RFQ / Quote / Proposal Estimating in 90 day increments over two years. Resulted in \$6.5 million in new services sold in 30 small transactions and \$5.5 million in new services sold to Procter & Gamble.

**CLOUD / AZURE WORK:** Built rapid prototype, solution for client with SharePoint cloud service to move ahead quickly, without waiting for on-premise solution.

**BUSINESS ANALYSIS, AGILE WORK:** Rapid AGILE, Iterative development using SharePoint to quickly prototype key applications including Sales Activity Tracking, Prospect Qualification, Incentive Management, Time Tracking, Services Costing, RFQ / Quote / Proposal Estimating.

**CRM WORK:** Advanced CRM sales support applications up and running in 90 days. 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.

**BUSINESS RESULTS SUMMARY:** \$6.5 million in new services sold in 30 small transactions over three years. \$5.5 million in new services sold to Procter & Gamble. Provided evidence to general manager that allowed him to counter unrealistic demands from parent company for 200% annual growth.

**Crossmark (B to B Services)**

**July 2003 to June 2006**

**CRM Specialist, Agile Technical BA, SharePoint No-Code Solutions Developer, Technical PM**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Business Services Company, built and deployed systems for CRM field sales, field service, new products and Branch Administration in 90 day increments over 2 ½ years. Resulted in \$2.5 million per year in hard cost savings and \$10 million in additional sales per year because “easier to do business with.”

**BUSINESS ANALYSIS, AGILE WORK:** Led a nation-wide business process improvement taskforce to improve CRM field sales, field service, new products and Branch Administration. EXTENSIVE BEFORE AND AFTER PROCESS MAPPING: 30+ line managers actively participated in the process mapping. “STAPLE YOURSELF TO AN ORDER” concept was pivotal. FIELD PROCESS COMPLIANCE was audited and “WHO USING WHAT” report showed users at each location who were not using the system. Made it easy for senior management to require compliance. Used SharePoint 2003 to prototype and define requirements. Informal AGILE, iterative approach.

**NO-CODE, WORKFLOW, FORMS, ADVANCED APPS** included CUSTOMER SELF SERVICE, SELF ORDERING SITES: 100 customer self-serve web sites and apps created by power users allowing customer self-ordering of complex services. USERS DESIGNED AND ACTUALLY USED NEW SYSTEM.

**CRM WORK:** Trained and coached 50+ power users in developing their own solutions. CRM apps included 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. RFQ / QUOTE / PROPOSAL ESTIMATING / PRICING / CONTRACTING was the most critical process optimized and contributed the most to annual cost savings.

**BUSINESS RESULTS SUMMARY:** \$2.5 million per year in hard cost savings for project cost of less than \$400,000. \$10 million in additional sales per year because “easier to do business with.” Consolidated 36 offices to 13 while creating a nation-wide set of standard processes, removed 250,000 potential errors per year and freed up 63,000 sales and admin hours per year. Outstanding project with strong user and executive buy-in. 80% REDUCTION IN EMAIL. Estimates of savings provided by client. SERVICES COSTING, CUSTOMER P&L: Made significant progress in time tracking of white collar labor and collecting underlying data needed to produce a services P&L per customer.

**QUICK HIT BENEFITS:** A weekly sales status update from 70 people was switched from Excel to SharePoint creating substantial labor savings and error reduction in just two weeks. Dramatic improvement was seen in field cooperation with headquarters on customer service issues in just 60 days. Contributed to positive momentum, helped sustain the long-term effort.

See case study and work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html#a3.1> (case study) <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html#a1.3> Item 3.1a (Skinny CRM reference material)

**CRM Specialist, Agile Technical BA, Technical PM, Expert Witness**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Financial Services firm, as Expert Witness on IT Project Management recovered \$3.5 million for client in suit against a software vendor making “rapid development” promises but not delivering.

**ARCHITECTURE and TECHNICAL WORK:** Large Custom Development, Oracle, C++. Reviewed architecture, development methods, controls, testing for two year project with team of 20 in preparation of lawsuit.

**BUSINESS ANALYSIS, AGILE WORK:** Vendor failed in Agile development, spent \$2 million project budget on uncontrolled iterations and hid the true status of the project while soliciting more money. Project was sold as waterfall, process improvement. Vendor settled lawsuit.

**CRM WORK:** Personally documented all aspects of this advanced financial services CRM System while development was ongoing. Apps included forecasting, product sales quota attainment, sales recruiting, training, compensation, performance evaluation, promotion, sales performance management, quoting, rating, collecting data for underwriting, product sales. Included agency office management with heavy emphasis on agent recruitment, agent training, agent compensation. Integrated with extremely complex retirement planning, estate planning, investment portfolio management for end customers.

**BUSINESS RESULTS SUMMARY:** \$3.5 Million settlement for client 30 days before trial.

**Conventional IT Projects with SharePoint-Predecessor Technologies:  
ViewStar (Global360/OpenText), Novell Netware, Other**

**City of Carrollton, Texas**

**(June 2004 to August 2004)**

**ROLE: Project Management Evaluation and Recommendations, Consultant, Senior Project Manager**

**KEY WORK: Projects Management**

**DEPARTMENT SOLUTIONS FOR: Engineering / Construction Dept.**

**RESULTS –** Received commendation from Asst. City Manager for insights provided on very large portfolio of projects.

**PROJECT DETAILS –** Analysis of and recommendations for Engineering / Construction Dept. projects management.

**Problem 1:** Extremely large program of city government and developer construction projects continually running into trouble (late, over budget, disputes.)

**ADDITIONAL DETAILS –** Work included Project Management, Estimating, Project Planning, Scope Management, Change Control, Status Reporting, User Training, User Documentation, Process Mapping, Workflow, Process Improvement and Project Manager Evaluations (informal).

**Renaissance Capital (Caminosoft)**

**(February 2004 to May 2004)**

**ROLE: SharePoint Predecessor Technology, Consultant, Evaluate Strategy, Find Niche, Replace CEO**

**KEY WORK: Electronic Document Retention, Deletion, Compliance**

**RESULTS –** Focused company strategy on electronic document retention, deletion, compliance management for banks and financial services firms and brought in new CEO in 90 days. CEO grew company from \$500,000

in sales and substantial losses to \$2 million in sales and near breakeven, including a \$1 million sale to Computer Associates.

PROJECT DETAILS – Consulting project to evaluate strategy, evaluate management team, find niche for proven software, replace CEO.

### **Engineered Air Balance, (B to B services, Construction)**

(June 2002 to March 2003, )

**ROLE:** **SharePoint Predecessor Technology, Technical Project Manager, Senior Business Analyst**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For an Engineering Services firm, 90 day project resulted in 30% labor savings on critical process and improved customer service.

**KEY WORK:** **Process Improvement, Automate Workflow**

**RESULTS:** 30% labor savings on critical process and improved customer service. Project completed in 90 days. See work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html> item 3.9

**TECHNICAL DETAILS:** Process improvement and automate workflow for critical service to customer, including master document creation, update, transmittal. Waterfall methodology.

### **Grote Consulting, (Nationally Known Consulting Firm)**

(March 2002 to August 2002, )

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For an HR Consulting firm, software specification and bid package for web development completed in 90 days after multiple failures by previous vendors.

**ROLE:** **Website Design Development, Senior Business Analyst**

**KEY WORK:** **Website, Software Specification, RFP**

**RESULTS:** Completion in 90 days after multiple failures by previous vendors, client delighted. See work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html> item 3.21

**TECHNICAL DETAILS:** Development of software specification and bid package for web development. Project allowed on-line sale of a previously manual service product. Waterfall methodology.

### **Verizon, (Telecom)**

**March 2001 to October 2001**

**Program Manager, Project Manager responsible for \$10 Million Program of projects, Oracle, C Programming based**

**RESULTS:** Under great difficulty, including 9/11, able to define scope and requirements for one critical project and move forward. Delighted business unit manager (see client commendation email.)

**TECHNICAL DETAILS:** \$10 million program of 11 projects for telephone customer self-service websites. Assisted with Verizon's (ultimately) successful transition from operator-based services to customer-self-service. Numerous difficulties. Waterfall methodology.

### **Northern Telecom (Manufacturer)**

(February 2001 to May 2001)

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For a Telecom Manufacturer, completed software development project for telephone switch product development, testing, QA in 90 days. Prevented 33% overrun.

**ROLE: Oracle, C Programming, Scratch Development, Technical Project Manager, Senior Business analyst**

**KEY WORK: Earned Value, Screen Flow Signoff, Prevent Overrun**

RESULTS: Prevention of 33% overrun, completed in 90 days, on time, on budget, happy client. See work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html> item 3.20

TECHNICAL DETAILS: Software development project for telephone switch product development, testing, QA. Applied screen flow sign-off, Earned Value project management and change control to convert project to fixed fee and keep under control. Waterfall methodology.

## **Specialty Retailer (2001)**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY: For A Specialty Retailer**, reduced order processing from 5 days to 1½, process from 96 steps to 78 in 90 days.

(3.13) **Order Processing Reduced from 5 Days to 1 1/2 Days Through Process Improvement\***

Case study <file:///www.tia4.tiainc.net/Public/HowToReduceOrderProcessingTimeNewsletter.pdf>

Use Cases, Software Specs, Bid Package <http://www.tia4.tiainc.net/Public/SalesUseCasesSpecialtyRetailer.pdf>

## **Technology Startup, Project Turnaround, Process, Feature Mapping, Use Cases Video Delivery Over The Internet, Commercial, Senior Business Analyst, Technical Project Manager**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY: For a Technology Startup**, led turnaround of software product development in extreme trouble. Used story board, process flow, documented 50+ use cases. Recovered \$300,000 from non-performing vendor and reduced cost to bring product to market by \$14 Million in 90 days.

### **[CLICK HERE for technical details.](#)**

RESULTS – Turnaround of project in trouble. Reduced cost to develop software and bring to market by \$14 million. Recovered \$300,000 from non-performing vendor in 90 days. [CLICK for Work Samples, Case Study](#)

PROJECT DETAILS – Applied scope management, contract enforcement, standards enforcement, process flow, use cases and other tools. Waterfall methodology.

Problem 1: Non-performing vendor spent \$700,000 without producing tangible results.

Problem 2: Scope, requirements, use cases undefined, nebulous, continually changing.

Problem 3: Extremely tight deadlines in order to bring project to market on time.

ADDITIONAL DETAILS – Included estimating, project planning, change control, status reporting, process mapping, workflow, requirements, specifications, partial Earned Value, Process Mapping, Workflow, Process Improvement, Visio, Product Specifications, Agile Development, Waterfall Development, Project Management, On budget, As Promised, Meeting Specification, Vendor RFP, Contract Management, Oversight, Vendor Interface, Functional Specifications, Use Cases, Extreme Complexity, Litigation Prevention, Cross-Functional Team and Gap Analysis.

**(2000, 4 Months, Full time)**

## **City of Fort Worth (June 1999 to September 1999)**

**ROLE: Year 2000 Compliance, Technical Project Manager**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For City of Fort Worth, 25% reduction in testing and quality assurance cycle time, completed in 90 days.

**KEY WORK:** AS400 and Client/Server

RESULTS – 25% reduction in testing and quality assurance cycle time. Note of commendation from supervisor.

PROJECT DETAILS – Project to bring all city systems into Year 2000 compliance. Included RPG, Cobol, C Programming.

Problem 1: Fragmented, “go-go, test everything now” mindset for Y2K testing.

Problem 2: Extremely tight deadlines due to Year 2000 cutover date.

ADDITIONAL DETAILS – Work included Project Management, Estimating, Project Planning, Scope Management, Change Control, Status Reporting, Meeting Specification, Requirements, Functional Specifications, Test Cases, Testing, QA (Quality Assurance), Process Mapping, Workflow and Process Improvement.

### **Alliance Data Systems, (B to B services) (1999-2000)**

**ROLE:** Technical Project Manager, Process Analyst, Senior Business Analyst

**KEY WORK:** Improve Project Management Processes For Outsourced Software Development Department of 70, \$32 per hour Improvement in Gross Margin

RESULTS – \$32 per hour improvement in gross margin for outsourced software development. Much credit due to others, ask for details. [Case Study](#)

ADDITIONAL DETAILS: Work included estimating improvement, partial Earned Value, requirements, specifications, RFPs, testing, QA, Process Mapping, Workflow, Process Improvement, Visio, Waterfall Development, Project Management, PMO (Project Management Office), On time, On budget, As Promised, Meeting Specification, Vendor RFP, Functional Specifications, Testing, QA (Quality Assurance), User Training, User Documentation, SDLC (Software Development Life Cycle), Extreme Complexity, Very Large Scale Integration and Gap Analysis.

### **Alliance Data Systems, (Credit Card Services) Deregulated Electricity and Gas (January 1997 to May 1999)**

**ROLE:** Technical Project Manager, Process Analyst, Senior Business Analyst

**KEY WORK:** Large Package Integration, Client/Server, Mainframe, Business Analyst, Technical Project Manager

RESULTS – Software package purchased, installed and integration mapped out. Ultimately resulted in 10 customers for new outsourcing business unit, but extreme trouble. Complex situation.

PROJECT DETAILS – Financial services integrated included Charge Calculation, Bill Print, Statement Print, Bill Image Present, Recurring Credit Card Payment, Credit Card Authorization, Credit Card Payment Processing, Credit Card Settlement, Cash and Check Remittance Processing, Nightly Batch Processing, Rejected Transactions, Automated Clearing House Check Processing. Left project before unrealistic promises were made to customers / partners resulting in litigation. Waterfall methodology.

**Celanese, (Chemical Manufacturer) August 1997 to December 1997**  
**Technical Project Manager, Led Successful Turnaround of \$5 Million Project In Trouble**



**RESULTS:** Scope reduced and project completed in 90 days. Vendor subsequently closed \$10 million additional services sale with client. \$230,000 in change orders collected through enforced written scope control. Resolved authority / responsibility problem.

## **Johnson and Johnson Subsidiary** (Pre-1997, 4 months, Full time)

**ROLE:** SharePoint Predecessor Technology, Technical Project Manager, Senior Business Analyst

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For Johnson & Johnson, built system to estimate IT department work load and manage scope. Resolved 200% IT department under-funding. Completed in 60 days.

**KEY WORK:** Lotus Notes, Quantify IT Department Workload, Resolve Understaffing

**RESULTS:** Resolved IT department being under-funded by 200%+. Project completed in 60 days.

**TECHNICAL DETAILS:** Effort to create a Lotus Notes database to estimate IT department work load and manage scope. Agile methodology.

## **Federal Express** **1997, prior to, 6 months, Full time** **Technical Project Manager, Technical BA for \$6 Million Program of Projects**

**RESULTS:** Helped put in place systems needed for FedEx's ultimate successful entry into local trucking / delivery business. (Enormous problems. Ask for details.)

**TECHNICAL DETAILS:** \$6 million program of five projects for entry into trucking / logistics industry. Included scheduling, routing, container tracking, load optimization and rate setting.

## **Texas Instruments, Two Projects** **1997, prior to, 4 months, Full time** **Technical Project Manager for Imaging, Workflow, Process Simplification, Accounts Payable, Accounts Receivable**

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For Texas Instruments, led two "bleeding edge" workflow projects, completed both in 120 days. Saved \$2.25 million in labor over 5 years in accounts payable, improved internal customer service 400%, freed up \$5 million+ in cash from accounts receivable over 5 years.

**RESULTS:** "Bleeding edge" projects on time, on budget, as promised, cover story for PMI magazine. Saved \$2.25 million in labor over 5 years in accounts payable, improved internal customer service 400%, freed up \$5 million+ in cash from accounts receivable over 5 years. Projects completed in 120 days. Hybrid of waterfall and agile methodologies.

**TECHNICAL DETAILS:** ViewStar / Global360 / OpenText project. Earned Value project management directly contributed to success by providing early warning that project was running behind.

## **Northern Trust (bank)** (Pre-1997, 4 months, Full time)

**ROLE:** SharePoint Predecessor Technology Project, Technical Project Manager, Lead Project Turnaround

**KEY WORK:** Workflow, Imaging, Scanning, Integration, Process Simplification Turnaround

**RESULTS:** Settlement / prevention of \$4 Million software development lawsuit.

TECHNICAL DETAILS: Technology was ViewStar / Global360 / Open Text (SharePoint Predecessor). Applications included extensive Client Portfolio Management for all aspects of client relationship including trust, investments, loans and conventional banking. Took over project in extreme trouble, severely underbid by vendor. Hybrid of waterfall and agile methodologies

## **Frito Lay**

(Pre-1997, 3 months, )

**ROLE:** SharePoint Predecessor Technology, Technical Project Manager

**AGILE / HYBRID / ITERATIVE / RAPID RESULTS SUMMARY:** For Frito Lay, led advanced workflow project resulting in 25% reduction in accounts payable cost per invoice, accounts payable cycle time reduced by 25%. Completed in 90 days.

**KEY WORK:** Workflow, Imaging, Process Simplification Project for Accounts Payable

**RESULTS:** 25% reduction in accounts payable cost per invoice, accounts payable cycle time reduced by 25%. Project completed in 90 days. See work samples: <http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html> item 3.6

TECHNICAL DETAILS: ViewStar / Global360 / OpenText project. Agile methodology.

## **MCI**

(Pre-1997, 3 months, Full time)

**ROLE:** SharePoint Predecessor Technology, Technical Project Manager

**KEY WORK:** Workflow, Imaging, Process Simplification, Accounts Receivable, Other Accounting Applications

**RESULTS:** Reduced cycle time for deployment of Workflow systems from 6 weeks to 6 days. Project completed in 60 days. Turned unhappy client into repeat customer, but second project ultimately failed.

TECHNICAL DETAILS: Two ViewStar / Global360 / OpenText projects. Agile methodology.

## **State of Texas, Three Projects**

**1997, prior to, 3 Years, Full time**

**Technical Project Manager for \$8 Million Series of Projects**

**KEY WORK:** Welfare Payment Process, Reduce Fraud, Labor, State Board of Insurance

**RESULTS:** \$240 million savings for State of Texas (\$21 million savings allocated to Tom's projects.)

TECHNICAL DETAILS: Applications included Qualification by County Residence, Authorization to Disperse, Logging, Operating System and Database Modifications to Support Transaction Tracking, network infrastructure for Department of Insurance. Technology included Novell Netware and Databases. Multi-year initiative involving many parties. Saved project after bankruptcy of employer. See letter of commendation from State of Texas.

## **Dun & Bradstreet Software**

(Pre-1997, 1 Year, Full time)

**ROLE:** Pioneering Mainframe to Client/Server Integration, Technical Project Manager

**KEY WORK:** Data Warehouse, Business Intelligence, Financial Applications

**RESULTS** – Prototype software implemented in 90 days with some benefit to accounting departments, but hard lessons learned.

PROJECT DETAILS – Two data warehouse, business intelligence projects integrating new client/server tools with mainframe general ledger, accounts payable, accounts receivable systems. Included interfaces to D&B (MSA and McCormick & Dodge) mainframe accounting applications. Hybrid of waterfall and agile methodologies.

### **Union Pacific Railroad / Resources (natural gas trading)**

**(Pre-1997, 2 Months, )**

**ROLE: SharePoint Predecessor Technology, Senior Business Analyst**

RESULTS – Determined proposed project budget was only 10% of funds spent by industry competitors for similar systems. Recommended against proceeding.

PROJECT DETAILS – Evaluate viability of proposed solution for natural gas commodity futures trading, risk, portfolio management software development project. Agile methodology

### **TPA (A Medical Insurance Claims Processing subsidiary of Employers Reinsurance)**

**(Pre-1997, Three Months, )**

**ROLE: SharePoint Predecessor Technology, Technical Project Manager, Technical Sales Rep**

RESULTS – "Bleeding Edge" technical solution implemented smoothly, provided stable platform for insurance claims processing.

PROJECT DETAILS – Sold and implemented very early, "bleeding edge" Novell network as infrastructure to support 25 users providing medical insurance claims processing.

### **Kidder Peabody Financial Services**

**(Pre-1997, One Year, )**

**ROLE: SharePoint Predecessor Technology, Consultant, Technical Project Manager**

**KEY WORK: Letter Approval, Generation, Simple CRM for Client Portfolio Management**

RESULTS – Pioneering Client/Server system functioning and viable for many years

PROJECT DETAILS – Technology included Novell Netware and Databases. Provided support, training and disaster recovery. Financial applications supported included Letter approval and generation and simple client portfolio management.

### **George K. Baum Financial Services**

**(Pre-1997, One Year, )**

**ROLE: SharePoint Predecessor Technology, Consultant, Technical Project Manager**

**KEY WORK: Advanced CRM for Client Portfolio Management**

RESULTS – Pioneering Client/Server system functioning and viable for 5 years.

PROJECT DETAILS – Technology was Novell Netware and Databases. Applications supported included extensive Client Portfolio Management for all aspects of client relationship including trust, investments and loans. Also provided support, training, and disaster recovery for pioneering local area network hardware and software (Netware, a predecessor to SharePoint.)

### **Collet Oil Ventures**

**(Pre-1997, 2 Years, )**

**ROLE: SharePoint Predecessor Technology, Consultant, Technical Project Manager**

**KEY WORK: Investor Royalty Payments**

RESULTS – Pioneering Client/Server system functioning and viable for many years

PROJECT DETAILS – Technology was Novell Netware and Databases. Applications supported included Investor Royalty Payments Management. Also provided support, training, and disaster recovery.

### **Farmland Industries (Manufacturer of Batteries and Paint) (Pre-1997, Three Months, )**

**ROLE: Manufacturing Software Evaluation, Infrastructure, Business Analyst, Technical Project Manager**

**KEY WORK: Pioneering Client/Server Applications**

RESULTS – Paint plant project produced \$262,000 reduction in inventory and improved levels of service. Battery plant project failed. Work samples and case study  
<http://www.tia4.tiainc.net/Public/clientsuccessstoriesall.html> item 3.10

PROJECT DETAILS – Paint plant manufacturing package implemented, battery plant manufacturing package implemented. Network infrastructure implemented. Waterfall methodology.

Problem 1: One project failed, never used while second, smaller project produced great results.  
Problem 2: Project failed due to absence of user participation, user buy-in, forcing high-tech onto old line manufacturing people.  
Problem 3: Software too complex.

ADDITIONAL DETAILS – Work included requirements, specifications, RFPs, user training, package implementation. Work also included Project Management, On time, On budget, As Promised, Meeting Specification, Vendor RFP, User Training, User Documentation, Cross-Functional Team and Gap Analysis.

### **Tallgrass (disk drive manufacturer) (Pre-1997, Seven Months, )**

**ROLE: Server Product Development, Technical Product Manager**

RESULTS – First on-time introduction of a new product in two years.

PROJECT DETAILS – Developed server product using Banyan Vines operating system.

Problem 1: Needed pioneering network server developed.  
Problem 2: Extreme deadline pressure due to previous failures to get to market on time.

### **Education, Certifications:**

- Iowa State Univ. – BS, Business Admin, minor work in Electrical Engineering, 1997, prior to
- Black Belt, Tae Kwon Do
- Wrestling Scholarship to Iowa State
- PMP Certification by Project Management Institute, 1994
- Salesforce Certified Admin ADM 201, August 2017

### **Key Professional Contributions**

- Cover Story, PMI's (Project Management Institute) Magazine, December 1995. First to Use Earned Value Project Management on Large, Commercial Computer Projects
- Journal of Project Management: Peer-Reviewed Journal Study of computer project outcomes published by PMI in 1994
- Book: "How to Turn Computer Problems into Competitive Advantage" published by PMI in 1998
- President, Dallas Chapter of IMC (Institute of Management Consultants), 2000 - 2002, National Award for Most Improved Chapter
- National Board of Directors, IMC, Elected 2004
- 100+ Talks and National Conference Sessions given
- Four formal research studies, Dozens of Articles, Cases, Publications
- Book: "A New Model for Software Company Investing" self published in 2003

### **Employment Chronology Detail**

**FMCJLT, a Job Training, Job Leads Non-Profit Organization** **July 2017 to Present**  
**Salesforce Certified Administrator, Microsoft CRM Specialist, SharePoint, Azure Architect, Trainer**

**Aecom (a global Architecture, Engineering, Construction firm)** **June to July 2017**  
**Cloud Architect for Azure, SharePoint 2013**

**Exeter Finance (a Sub-prime Auto Lender)** **May 2017**  
**Cloud, SharePoint Architect, Migration Specialist for Azure, SharePoint 2010, 2013, 2016, SharePoint Online, Office 365**

**Private Equity Owned Textile Manufacturer** **November 2016 to April 2017**  
**Cloud, SharePoint Architect, Migration Specialist for Azure, SharePoint 2013, SharePoint Online, Office 365, Migration and Consolidation of Old ERP to Cloud, Interfaces, Data Warehouse**

**Mitel (a Telecom Hardware and Software Manufacturer)** **November 2015 to April 2017**  
**Cloud, SharePoint Architect, Migration Specialist for Azure, SharePoint 2003, 2010, 2013, SharePoint Online, Office 365**

**Golden Spread Electric Utility** **August 2014 to July 2015**  
**Cloud, SharePoint Architect, Migration Specialist for Azure, SharePoint Online, Office 365, Agile Technical BA, Technical PM for Large Conventional IIS Website**

**Morrison Wholesale Distribution** **April 2014 to August 2014**  
**Cloud, SharePoint Architect, Migration Specialist for Azure, SharePoint Online, Agile Technical BA, No-Code Solutions Developer**

**Pacific Union Mortgage** **December 2013 to February 2014**  
**SharePoint Architect, Migration Specialist for SharePoint 2013**

**Caliber Mortgage** **June 2013 to September 2013**  
**SharePoint Architect, Migration Specialist for SharePoint 2010 / 2013, Agile Technical BA, No Code Solution Developer**

**J.F. Shea, (a Home Builder and Mortgage Company)** **October 2013 to December 2013**  
**SharePoint Architect, Migration Specialist for SharePoint 2010, 2013**

**Hyundai Motors** **December 2012 to February 2013**  
**SharePoint 2010 Architect, Agile Technical BA**

**Ettlinger Rosini (a Manufacturer's Rep)** **May 2012 to November 2012**  
**Cloud, SharePoint Architect for SharePoint 2010 Agile Technical BA, No-Code Solution Developer**

**Vista Machining** **January 2012 to December 2012**

Cloud, SharePoint Architect for SharePoint 2010, Agile Technical BA, No-Code Solutions Developer, Technical PM

Flowserve (a manufacturer) January 2010 to April 2012

Cloud, SharePoint Architect, Migration Specialist for SharePoint 2010, Agile Technical BA, No-Code Solutions Developer, Technical PM

Handleman subsidiary (B to B services), October 2007 to April 2010

Cloud, SharePoint Architect for SharePoint, Agile Technical BA, No-Code Solutions Developer

TIA Hosting, a Cloud Service Provider June 2006 to October 2007, Small Projects to Present

Cloud, SharePoint Architect, Migration Specialist for SharePoint 2003, 2010, 2013, 2016, SharePoint Online, Office 365, Agile Technical BA, Technical PM, No-Code and Coded Solutions Developer, SQL Server, SSRS, SSIS Integration Specialist

Crossmark (B to B Services) July 2003 to June 2006

SharePoint Specialist, Agile Technical BA, No-Code Solutions Developer, Technical PM

First Command (Insurance, Financial services) March 1999 to August 2003

Agile Technical BA, Technical PM, Expert Witness

### **Employment Chronology Summary**

FMCJLT, a Job Training, Job Leads Non-Profit Organization Dallas, TX, July 2017 to Present

Salesforce Certified Administrator, Microsoft CRM Specialist, SharePoint, Azure Architect, Trainer

TIA Hosting, Tom Ingram & Assoc., Various Consulting Roles Dallas, TX, May 2017 to July 2017

Cloud, SharePoint Architect, Migration Specialist for SharePoint 2003, 2010, 2013, 2016, SharePoint Online, Office 365, Agile Technical BA, Technical PM, No-Code and Coded Solutions Developer, SQL Server, SSRS, SSIS Integration Specialist. Projects for Exeter Finance and Aecom.

Mitel (a Telecom Hardware and Software Manufacturer) Dallas, TX, November 2015 to April 2017

Cloud, SharePoint Architect, Migration Specialist for Azure, SharePoint 2003, 2010, 2013, SharePoint Online, Office 365

Golden Spread Electric Utility Amarillo, TX, August 2014 to July 2015

Cloud, SharePoint Architect, Migration Specialist for Azure, SharePoint Online, Office 365, Agile Technical BA, Technical PM for Large Conventional IIS Website

TIA Hosting, Tom Ingram & Assoc., Various Consulting Roles Dallas, TX, June, 2013 to August 2014

Cloud, SharePoint Architect, Migration Specialist for SharePoint 2003, 2010, 2013, SharePoint Online, Office 365, Agile Technical BA, Technical PM, No-Code and Coded Solutions Developer, SQL Server, SSRS, SSIS Integration Specialist. Projects for Morrison Wholesale Distribution, Citizens Business Bank, Pacific Union Mortgage, J.F.Shea Mortgage Company / Homebuilder, Caliber Mortgage, Ettinger Rosini, Vista Machining, City of Kennedale, TX, Ruhrpumpen\*.

Cognizant, Associate Director Dallas, TX, November, 2012 to June, 2013

Cloud, SharePoint Architect, Migration Specialist for SharePoint 2010, Agile Technical BA, No-Code Solutions Developer, Technical PM. Projects for Hyundai Motors, Celgene, Baxter Healthcare and Johnson Controls.

Flowserve (a manufacturer) Dallas, TX, January 2010 to April 2012

Cloud, SharePoint Architect, Migration Specialist for SharePoint 2010, Agile Technical BA, No-Code Solutions Developer, Technical PM

Handleman subsidiary (B to B services), Nashville, TN, October 2007 to April 2010

Cloud, SharePoint Architect for SharePoint, Agile Technical BA, No-Code Solutions Developer

TIA Hosting, Tom Ingram & Assoc., Various Consulting Roles Dallas, TX, June 2006 to October 2007

**Cloud, SharePoint Architect, Migration Specialist for SharePoint 2003, 2010, 2013, 2016, SharePoint Online, Office 365, Agile Technical BA, Technical PM, No-Code and Coded Solutions Developer, SQL Server, SSRS, SSIS Integration Specialist.** Level 2 Design, City of Carrollton, TX, Renaissance Capital, Engineered Air Balance, Grote Consulting\*.

**Crossmark (B to B Services) Dallas, TX, July 2003 to June 2006**  
**SharePoint Specialist, Agile Technical BA, No-Code Solutions Developer, Technical PM**

**First Command (Insurance, Financial services\*) Fort Worth, TX, March 1999 to August 2003**  
**Agile Technical BA, Technical PM, Expert Witness**

**Decision Consultants, Inc., Director of Delivery\* Dallas, TX, November 2000 to October 2001**  
**Program Manager, Agile Technical BA, Technical PM.** Supervised 160 consultants Projects for Nortel and Verizon.

**Cambridge Technology Partners, Dun & Bradstreet Software, Xerox, IBM-led Spin Off, 2000, Prior To Various roles in early career including Technical PM, Technical BA, Technical Sales and Reengineering Consultant.** Projects for City of Fort Worth, TX, Alliance Data Systems, Celanese, Johnson & Johnson subsidiary, Federal Express, Texas Instruments, Northern Trust, Frito Lay, MCI, State of Texas, Union Pacific Railroad (natural gas), Kidder Peabody, George K. Baum Financial and Farmland Industries.

\* Projects are listed here for brevity. Details upon request.

### **Employment Chronology**

**April 2017-Present: Independent Consulting / Contracting,** Dallas, TX, Camden, NJ, Mason City, IA. Technical hands-on, Salesforce, SharePoint, process analyst, Agile PM, BA roles for DFWJLT, Aecom, Exeter Finance, Private Equity Textile Manufacturer.

**Nov 2015-April 2017: Mitel** (a Telecom Hardware and Software Manufacturer), Dallas, TX. Salesforce, Migration Specialist, SharePoint Architect, Azure, Agile, process analyst, PM, BA, Developer roles.

**Aug 2014-July 2015: Golden Spread Electric Utility,** Amarillo, TX. Migration Specialist, Cloud Architect for Azure, SharePoint Online, Office 365, Agile, process analyst, Technical BA, Technical PM, Developer roles.

**2013-Aug 2014: Independent Consulting / Contracting,** Dallas, TX, Los Angeles, CA. Salesforce, technical hands-on, process analyst, PM, BA roles for Morrison Wholesale Distribution, Pacific Union Mortgage, J.F. Shea Builders, Mortgage Company, Caliber Mortgage.

**2012-2013: Cognizant,** Orange County, CA, Dallas, TX. Associate Director, Technical PM, BA, Architect, Developer, pre-sales roles for Hyundai Motors, Celgene, Baxter Healthcare and Johnson Controls.

**2010-2012: Flowserve** (a manufacturer) Dallas, TX. CRM, Migration Specialist, Cloud Architect for SharePoint 2010, Agile Technical BA, No-Code Solutions Developer, Technical PM roles.

**2007-2010: Handleman** (B to B services) Nashville, TN, Dallas TX. CRM Specialist, Cloud Architect, Agile Technical BA, SharePoint, No-Code Solutions Developer roles.

**2006-2007: Independent Consulting / Contracting,** Dallas, TX. Technical hands-on, process analyst, PM, BA roles for Renaissance Capital, Engineered Air Balance, Vista Machining, Ruhrpumpen Manufacturing.

**2003-2006 Crossmark** (B to B Services) Los Angeles, San Francisco CA, Chicago, IL, Detroit, MI, Boston, MA, Newark, NJ, Tampa, FL, Dallas, TX. CRM, Field Service Specialist, Agile Technical BA, SharePoint No-Code Solutions Developer, Technical PM, Process Analyst roles.

**2001-2003: First Command,** (Insurance, Financial services), Dallas, TX. CRM Specialist, Agile Technical BA, Technical PM, Expert Witness roles.

**2000-01: Decision Consultants, Inc.,** Dallas, TX, Director of Delivery over 200 Consultants, Program Manager, Project Manager, Head of BA Group and Director of Delivery supervising 160 consultants. Hands-on BA roles for Nortel and Verizon including Oracle, Java, C Development

**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: Xerox, IBM (spin-off), Dun & Bradstreet Software, Cambridge Technology Partners**, Memphis, TN, Chicago, IL, Miami, FL, Kansas City, MO, Dallas, TX. Assoc. Director, PM, BA, Consultant, Product Manager, Technical Sales roles. Notable clients: Celanese, FedEx, State of Texas, Frito Lay, MCI, Northern Trust, United Telecom, Union Pacific Railroad Resources.

**Education, Certifications, Professional Contributions**

- Iowa State Univ. – BS, Business Admin, minor work in Electrical Engineering, 1997, prior to
- PMP Certification by Project Management Institute, 1994
- Salesforce Certified Admin ADM 201, August 2017
- Book: “How to Turn Computer Problems into Competitive Advantage” published by PMI in 1998
- Numerous Articles, Peer Reviewed Research, Case Study publications

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**1997, Prior To: Employed by Cambridge Technology Partners, Dun & Bradstreet Software, ViewStar, Tallgrass Technologies, United Telephone (Amerisource), Unisys, Xerox** in Dallas, TX, and Kansas City, MO. Employers also included my own start-up **Network Solutions, Inc.** and some other start-ups that are no longer in business. Roles included technical PM, technical BA, technical Sales and Reengineering Consultant for Johnson & Johnson subsidiary, Federal Express, Texas Instruments, Northern Trust, Frito Lay, MCI, State of Texas, Union Pacific Railroad (natural gas), Kidder Peabody, George K. Baum Financial and Farmland Industries.