David Berman

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**Summary**

Salesforce.com specialist designing, building, and implementing business processes and solutions that will drive business growth with a demonstrated track record of establishing vision, driving change and transforming organizations toward “faster, better, cheaper”. Strong background in defining global strategies and implementing best practices inclusive of IT governance, supply chain management, project management, application development, contact center management, change management, quality, testing, and outsourcing approaches to reduce costs, decrease time to market and improve quality. A proven transformation executive, organizational leader, mentor and coach with experience in implementing IT services aligned with business objectives in multiple International locations. Recognized by managers, peers, and subordinates for leadership, innovation, talent development and implementing change while partnering with the business and clients to deliver results.

Specialties:

**Leadership**: Demonstrated experience in creating organizations, leading global teams, driving change and delivering results which exceed customer expectations.

**Salesforce.com/Heroku/Communities**: Successful design, implementation, administration, maintenance, configuration and enhancement of complex Salesforce.com orgs with extensive experience with most versions of the Force.com, Group, Professional, Enterprise, Unlimited, and Developer Editions of Salesforce.com implementing Sales Cloud, Service Cloud, Campaigns, Marketing Cloud, Cases, Commerce Cloud/CPQ, Health Cloud, Einstein, and various AppExchange applications (DocuSign, Veeva, Vlocity, Oracle CPQ, Steelbrick, etc.) with complex integrations and configurations utilizing Visual Force, Lightning Components, Apex Coding, CTI, API, and out of the box capabilities in single tenant and multi tenant environments supporting in-house and remote workers, consumers, etc.

Innovation and Problem Solving:

Successful track record and passion for driving change and delivering results through innovative approaches that reduce costs, decrease cycle time, improve reporting and enhance product quality for the purpose of accelerating business results.

**Education**

**York University, Toronto, ON May 2001**

**Bachelor in Administrative Studies GPA: 3.3**

* General business degree
* Focus on finance, accounting, marketing, and human resource management

**The Institute For Financial Markets May 2006**

**Anti-Money Laundering** **Pass**

* Covered Canadian, U.S. and International anti-money laundering laws
* Best practices for avoiding and dealing with money laundering situations
* How to protect the company from possible compliance breaches

**Sandler Sales Institute July 2006**

**Sandler Professional Advantage Pass**

* Broke down the sales cycle according to the Sandler system
* Taught best practices for an easy close
* Instilled writing and public speaking skills

**The Institute For Financial Markets August 2006**

**Commodities, Options & Securities Course Pass**

* Taught how the securities and options markets work
* How to calculate contract prices and margin
* Using futures and options to hedge risk and make profit
* Prepared for the Series 3 and Series 30 exams

**Salesforce.com June 2011-November 2015**

**Admin Pass**

**Advanced Admin**

**Force.com Developer**

**Advanced Developer**

**Architect**

**App Builder**

**Sales Cloud Consultant**

**Service Cloud Consultant**

**Marketing Cloud Consultant**

**Solution Architect**

**Six Sigma Green Belt Training June 2011**

**Lean Level I & II July 2013**

**Experience**

**NBC Universal Sept 2017 – March 2019**

* + Enterprise Architect
		- 40 Salesforce Orgs with over 200 applications spanning all lines of business globally
		- Sales Cloud, Service Cloud, Marketing Cloud, CPQ, Wave/Einstein, Heroku, Quip, etc.
		- Helped stand up new Salesforce Center of Excellence
		- Wrote and published all Salesforce Principles and Standards as it applies to Architecture, Apex Coding Standards, Org Strategy, etc.
		- Program Lead of major transformational initiatives employing Lean/Six Sigma methodologies and approaches to define value/data-driven change to automate, optimize, streamline and standardize
			* Distribution
			* IP Rights
			* Contract Lifecycle Management
			* Master Data Management

**Sikich LLP**

 **Managing Director, National Salesforce Consulting Practice**

 **July 2018 – March 2019**

* P&L Owner
* Responsible for resource hiring, management and utilization
* Managed relationship and established SI Partnership with Salesforce.com
* Responsible for acquisition, closing deals
* Sold and implemented the largest Health Cloud Salesforce deal of 2018 for a new MedAdvantage Payer
* Sold and implemented one of largest B2B (Cloud Craze) Salesforce deals of 2018 for a large manufacturer

**DB Consulting, LLC**

 **Salesforce.com Consultant**

* **Cross River Bank June 2018 – February 2019**
	+ Salesforce Lead/Architect/Developer
		- Build out Salesforce automation functionality in support of Sales, Service, Internal Workflow, Document Supply Chain Management, etc.
* **Anthem Blue Cross July 2018 – September 2018**
	+ Salesforce Solution Architect/Onshore Production Support Dev Ops Team Lead, Small Group Sales, Vlocity application
		- Lead team of 2 Salesforce Developers and an Integration Developer
		- Liaise with business to capture issues and requirements
		- Flag design issues and report to Architecture team to refactor
		- Responsible to team hitting goals and redesigning application to be able to scale to 14 States to support Small Group Sales Automation
* **OnDeck Financial March 2018 – May 2018**
	+ Salesforce.com Solution Architect/Developer/PM/Lead
		- Full Salesforce Implementation with integration to proprietary legacy systems
		- Sales Cloud with CPQ
		- Service Cloud
		- Communities
* **Twitch, Inc. (An Amazon Company) Sept 2017 – December 2017**
	+ Salesforce.com Solution Architect/Developer/PM/Lead
		- Salesforce customer reporting
		- Visual Force
		- Lightning Component
		- Integration
		- Apptus/CPQ
* **CDX Diagnostics May 2017 – December 2017**
	+ Salesforce.com Solution Architect/Developer/PM/Lead
		- Full Salesforce Implementation with integration to proprietary legacy systems
		- Sales Cloud with CPQ components
		- Service Cloud
		- Communities
* **Twitter July 2016 – Sept 2017**
	+ Salesforce.com Implementation Lead
		- Complete retool of Twitter operations using Salesforce Service Cloud including:
			* Payroll
			* Procurement/AP (CPQ)
			* Facilities
			* Events
			* HR
			* Corporate Securituy
			* Information Security
		- Service Cloud with Communities to support the Case intake from:
			* Employees
			* Alumni
			* Suppliers
* **Blue Cross Blue Shield Massachusetts February 2016 – July 2016**
	+ Salesforce.com Solution Architect
		- Sales Cloud Implementation to support Group Sales and Renewals

**Accenture**

**Salesforce.com Consultant – Technology/SaaS – Business & Systems Integration**

**Member of Informatica 100 Team**

**Member of Cloud Sherpas Integration Team**

* **GlaxoSmithKline October 2015 – February 2016**
	+ Functional Lead – Onshore/Offshore Global Veeva implementation project in 39 countries/markets including, but not limited to:
		- Complex data integrations
		- MDM
		- Data normalization
		- Online/Offline capabilities
		- Real time and batch data cleansing capabilities
* **Stryker July 2015 – October 2015**
	+ Functional Lead – Onshore/Offshore project Salesforce.com/CPQ/Model N implementation including:
		- Complex data integrations
		- Data cleansing
		- MDM
		- Call Center/Telephony integration
		- Sales and Service Cloud functionality
		- Field traceability functionality (custom Visual Force)
* **Pfizer November 2014 –July 2015**
	+ Functional Lead/Technical Lead/Lead Team of Onshore and Offshore resources including, but not limited to:
		- Project Managers
		- System Architects
		- System Developers
		- Business & System Analysts and Senior Analysts
		- System testers
	+ Manage oversight on dedicated support team that maintains and upgrades systems (Salesforce.com and Veeva) with an average of 400 Change Requests and 5 major releases annually
	+ Manage an average of 2 projects myself doing Salesforce.com enhancements, for example:
		- Communities implementation for users in 56 countries
		- Service Cloud implementation for 5500 users
* **EMC September 2014 – November 2014**
	+ Manage Onshore and Offshore resources including, but not limited to
		- Project Consultants
		- Project Analysts
	+ Manage project planning phase including, but not limited to:
		- Business Requirements
		- Process Mapping
		- Meeting facilitation
		- Timeline and Status Updates
		- Value Approach Presentation

**Blue Cross Blue Shield of Florida (several positions below) Nov. 2010 to June 2014**

**Project, Sourcing, Support and System Development Manager**

* Lead major sourcing/implementation projects of business solutions and capabilities
* Work closely with internal and external cross functional areas, vendors and strategic partners to identify new ways to leverage assets in an effort to expand into new markets and industries/diversify revenue sources
* Provide sales and marketing operational support in the planning and execution of strategies enabling the business to achieve their goals based on their scope of work
* Provide regular reporting to senior leadership on all key performance indicators (KPI)
* Conduct/lead RFx processes
* Devise and implement sourcing/vendor management strategies
* Map current vs. future state processes to identify gaps and synergies to gain efficiencies and eliminate waste
* Negotiate/redline vendor contracts
* Maintain vendor relationships in the support of sourced business solutions and capabilities
* Work closely with vendors and IT on integrated capabilities and solutions based on value add processes derived from process mapping with a focus on Salesforce.com and integrated systems
* Act as a Salesforce.com Subject Matter Expert on all business solutions and capabilities including, but not limited to integrations and ensuring business value/financially justifying spend
* Manage team of Analysts and Project Consultants

**Owner - Document Supply Chain Management; Systems Admin Oct. 2013-June 2014**

* Responsible and accountable for Document Supply Chain Management for all of Florida Blue with a focus on Print and Digital Marketing (Blue Cross Blue Shield of Florida)
* Responsible for improving and streamlining processes to realize over $2M in annual savings
* Engineering and creating standardized processes and systems to control print cost and variation
	+ Work closely with Procurement to establish SRM guidelines and strategy
	+ Enhance and reconfigure PeopleSoft request intake capability/software
	+ Integrate data between SAS Marketing Operations Management tool and PeopleSoft purchasing and budgeting system
* Manage team of Print Coordinators and Buyers in partnership with Procurement Management
* Vendor Manager responsible for financial approvals and reconciliation of spend well above $10M annually
* Create Digital Marketing cataloguing and archiving system to
	+ Manage legal rights to assets
	+ Track assets from creation/purchase through usage
	+ Calculate impression valuation and ROI
* Report to Senior Executive Committees who care for the Operations of the Enterprise and the Financial Strategy of the Organization
* Create print buying strategy to realize money saving elements of scale across multi-functional areas of the organization
* Engineer and create disaster recovery plan

**Manager & SFDC/SAS Systems Administrator – Enterprise Marketing Oct. 2013-June 2014**

* Responsible for process improvement
* Manage Salesforce.com with integrated Marketing Automation system (Marketo) and Marketing Database (SAS)
* Enterprise Owner – Document Supply Chain Management
* Accountable for identifying improvement/cost saving opportunities and executing to realize improvement/savings
* Responsible for research and implementation of Marketing Operations Management system across all of Enterprise Marketing
* Collect data and create presentations for senior leadership to use to make data-driven business decisions
* Lobby across multi-functional areas to get backing and funding for initiatives my leadership tries to get approved by OC and EPC
* Project Leader/Owner:
	+ SAS MOM development and implementation
	+ eCommerce NetSuite capability
	+ Seminar/Event Management tool with integrated web forms on BCBSFL Websites and custom mail server integration
* Responsible for enabling the company to transform Marketing department into Agency model
	+ Build and support SAS Marketing Operation Management tool to support the five major areas of Marketing in the transition to an Agency model
	+ Create Digital Asset Management capability, processes and procedures to be the system of record for the entire company
	+ Create training and reference materials
	+ Conduct user training
	+ Create communications plan and strategy
	+ Build and maintain reporting and dashboards
	+ Administrator role

**Lean Integrator and Mentor Nov. 2010-June 2014**

* Responsible for utilizing Lean and Six Sigma methodologies and exercises in the pursuit of continuous improvement
* Work across multi-functional areas to realize synergies eliminating waste and generating enhanced analytics translating into cost savings, cost avoidance and profit
* Mentor for Lean students working to earn Lean Level I and Lean Level II certifications
* Use knowledge of Salesforce.com and other integrated systems to enable CI activities in the company

**Manager – Sales Operations & Salesforce.com Administration Nov. 2010-Oct. 2013**

* Accountability for the operational integrity of the 300 seat Direct Sales Contact Center including 200 Licensed Agents, an Outbound team, Chat team, Telephone Enrollment team, Status team, Scope of Appointment team, 3 Service Bureaus with over 260 Licensed Agents and 100 non-Licensed reps, 15 Managers in 5 locations (2 in Florida, one in Texas, one in North Carolina and one spread out Nation-Wide) conducting New Sales and Retention
* Responsible for maintaining metrics and reporting to earn **Benchmark Portal Certification as a best in class contact center (successful 2 years in a row under my leadership and achieved Top 10 Contact Center in North America in year 2)**
* Accountable for ensuring 100% user experience and adoption of Salesforce.com tools and processes
* Strategically design, build, troubleshoot and maintain sales tools including but not limited to
	+ integrated CRM system (Salesforce.com)
	+ integrated Soft Telephony system via CTI
	+ integrated Proprietary Production system with SSO (security), Visual Force, Apex and API integrations
	+ Marketing Automation system (Marketo)
	+ Marketing Database system (SAS) via Informatica/Apex/API
	+ Native Salesforce.com Chat system (Live Person)
	+ downstream systems that feed Commissions and Production systems (Siebel, Callidus, Synygy)
	+ as well as the Enterprise Data Warehouse (Oracle)
* Work closely with system Project teams to ensure ease of use of integrated systems for both the Agent as well as the Customer (UX design)
* Work closely with both internal Legal and Compliance as well as outside consultants to ensure that we are always being compliant in our policies and procedures
* Ensure that data is landing properly for maximum reporting/auditing potential
* Build, Analyze and Maintain regular and ad hoc reporting and dashboards as it relates to Call Center KPI, Auditing use of Call Center Sales tools, Lead Management, and Sales/Sales Conversion statistics
* Manage a team of seven (7) Analysts and Project Consultants to run day-to-day operations and support Agents and Managers on an as-needed basis
* Works strategically across multiple business areas/channels to achieve business objectives and provide quick issue resolution as it pertains to Salesforce.com/ Call/Sales Center Technology
* Build and maintain relationships with business vendors/partners to recommend and implement Technical Sales Tools
* Acts as an Agent of Improvement and Productive Change identifying processes that may be broken or have gaps and improving them in a manner that best benefits the business
* Support Agents on a day-to-day basis fixing technical issues that may arise on the fly
* Train Agents and Management on Technical changes and improvements to Sales tools
* Build scripting infrastructure in Salesforce.com CRM tool
* Provide leadership instances of risk, impacts to Sales metrics and business process gaps in an effort establish a consistent infrastructure
* Provide process standardization in an effort to make Blue Direct more scalable to allow for fast growth with little change to support infrastructure
* Act as a Subject Matter Expert as it relates to projects that impact Blue Direct Sales Contact Center
* Create Standard Operating Procedure documents to enforce best practices
* Write and/or approve Scope, Business Requirement, System Requirement documents
* Organize and conduct Regression Testing, User Acceptance Testing as well as IVP testing upon implementation

**Consultant June 2009-June 2010**

**Salesforce.com/Sales/Marketing Consultant/Network Marketing –**

Consulting with businesses to:

* Design, implement, configure, integrate, enhance and purchase Salesforce.com/Force.com products, services and peripherals
* Identify and penetrate target markets
* Train sales staff
* Launch sales initiatives
* Redevelop/restructure products/services to broaden market offering
* Source targeted leads
* Quality control/audit

**Business Broker –** Negotiated exclusivity on product lines to source to retail businesses in the medical/dental industry, consumer goods, as well as telecommunications.

**Lead Generation –** Built a team of lead generators to generate leads for any purpose using:

* Search Engine Optimization
* Google Adwords/Analytics
* Direct Marketing
* Digital Marketing
* Broad Media/Advertising
* Events/Seminars

**Sales/Marketing Management**

* Manage team of 18 Sales Representatives and Account Managers
* Implement sales strategies from writing call scripts to developing Strategic Alliances
* Develop, implement and manage all marketing, communications, events and public relations activities
* Responsible for all Event management and strategies
* Implementation of all Media Marketing
* Responsible for all of the company’s marketing initiatives to drive business growth
* Report directly to CEO/President
* Responsible for reaching and surpassing all sales/new client targets

**Braithwaite Global Inc. June 2008-June 2009**

 **VP, Business Development U.S. Division**

* Managed a team of 12
* Responsible for bringing in new business and maintaining current client relationships
* Manage team of inside marketing consultants
* Exceed annual quotas for total US sales as well as new business revenue numbers
* Report directly to CEO/President

**Corporate Foreign Exchange Executive (several positions) Jan. 2004 to April 2008**

**Foreign Exchange Trader/Mining Specialist/Strategic Partnerships, Citizens Bank**

 **June 2007 to April 2008**

* Responsible for building book of clients
* Trade for clients
* Hit quotas for new clients signed up, volume traded, and profit earned
* In charge of forging Strategic Partnerships in Ontario
* Wrote quarterly Mining report for mining clients at the bank

**Director, U.S. Corporate Foreign Exchange; Salesforce.com Specialist, Custom House (Western Union Company) Jan. 2006 to May 2007**

* Responsible for bringing in new accounts to build a book of clients
* Consult on system enhancements and configuration of Salesforce.com CRM tool
* Maintained current accounts
* Found new segments and initiatives in my territory
* Maintained monthly and annual budget targets
* Customized solutions for corporations with international accounting problems and risk exposure
* Network with local organizations to promote our services
* Specialized in international law firms based in New York City
* Developed relationships with business leaders in many industries
* Attended trade shows, seminars, conferences and networking events to increase business
* Worked closely with CFO’s, Treasurers, Controllers and Accounting departments to identify issues and solve them
* Responsible for submitting weekly and monthly Salesforce.com reports analyzing prospects sales stages and estimated closing dates with relation to revenue and budget

**Senior Foreign Exchange (Currency) Trader, Cambridge Mercantile Jan. 2004 to Jan. 2006**

* Built Million dollar (profit) a year book of corporate clients in less than 2 years
* Configured Salesforce.com CRM software replacing Matrix and ACT
* Acted as SME with regard to the design and workflow of Salesforce.com org
* Traded every major currency, most minors, and gold for corporate clients
* Wrote daily market updates to database of over 10,000 subscribers every morning
* Sought out new segments and strategic relationships to increase business and exposure

**Patterson Dental Inc. January 2002 – January 2004**

**Director of Purchasing, Equipment Dept.**

* Responsible for all purchasing of dental equipment
* Kept just-in-time ordering model
* Worked closely with suppliers
* Managed $20M inventory and warehouse
* Expert in dental equipment
* Managed team of over 20 sales reps on all equipment sales
* Reduced warehouse costs by $120,000 per year in my first 3 months

**Alpha Dental Supply Inc. December 2000 – January 2002**

**Director of Marketing and IT**

* Designed and created all marketing and PR material
* Created and managed network
* Managed and acted as Administrator running AS400 servers
* Manage and maintain ERP (IBM) and Inventory Management (GUI) systems
* Handled day-to-day office operations
* Worked closely with CEO to create marketing initiatives and promotion

**Martial Arts Instructor**

**Jewish Community Association January 2011 – June 2014**

**Jacksonville, FL**

**Adult Martial Arts Instructor**

**Women’s Self Defense Instructor**

**Montessori School After School Martial Arts August 2009 – May 2010**

**Toronto, ON – 3 Campuses**

**Junior Instructor January 1998 – May 2009**

**South Bend, IN, USA; Jerusalem, Israel; Toronto, ON, Canada**

**Skills/Tool**

**Technology**

* System Administration 13 years
* NetSuite 7 years
* Salesforce.com 13 years
* Microsoft Dynamics 4 years
* IBM/Websphere 6 years
* Oracle 10 years
* SAP 10 years
* Sharepoint 5 years
* Seibel 8 years
* SAS 4 years
* five9 4 years
* Genysis 3 years
* Avaya 3 years
* Cisco 7 years
* Informatica 7 years
* Microsoft Visio 6 years
* Microsoft PowerPoint 15 years
* Microsoft Office 20 years
* Microsoft Project 10 years
* Drawloop 2 years
* Conga 2 years
* Marketo 5 years
* Eloqua 3 years
* Pardot 3 years
* CPQ 3 years
* Model N 3 years
* Jira 5 years
* Version 1 1 year
* Live Person 4 years
* Tableau 4 years
* Cognos 4 years
* PowerBI 4 years
* Microstrategies 4 years
* AWS 3 years
* Azure 2 years
* Google Cloud 2 years
* And the list goes on…

**Development Languages**

Java

Python

JavaScript

PHP

Ruby

Swift

.Net

Scala

Apex

And others…

**Business**

* Marketing Operations Optimization 2 years
* Reporting/Data Mining 10 years
* Contact (Call) Center Development/Management 5 years
* Supply Chain Management 4 years
* Contracts and Vendor Management 4 years
* Procurement/Inventory Management 5 years
* Process Engineering 7 years
* Sales Engineer (Presale and Post Sales) 8 years
* Sales/Sales Management 8 years
* Direct Marketing 4 years
* Digital Marketing 4 years
* Experiential Marketing 4 years
* Partnerships/Sponsorships 4 years
* Seminars and Education Marketing 4 years
* Media and Advertising 5 years
* System Integration 10 years
* Compliance and Audit 10 years
* Telephony (Premise, Cloud, Hybrid) 5 years
* Workforce Management 4 years
* Advanced Reporting, Analytics and Dashboards 10 years
* Project Management 10 years
* Business Analyst 8 years
* Systems Analyst 8 years
* Training and Adoption 10 years
* Vendor Management 7 years
* Sourcing Risk Management 5 years
* Procurement/Inventory Management 5 years
* Operations Management 5 years
* Logistics 4 years
* Subject Matter Expert 10 years
* People Manager 10 Years
* Technical Writing 10 years
* Rating Engine Optimization 3 years
* Service 10 years

References available upon request.