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| **SUMMARY** |

Experienced Solution Architect skilled in solution design and hands-on implementation of enterprise based CRM based solutions which include:

* Salesforce
* Vlocity for Salesforce (Health and Insurance)
* Salesforce Financial Services Cloud and Health Cloud
* CPQ and CLM (Apttus, Oracle CPQ and Salesforce)
* Microsoft Dynamics CRM and 365
* Pre-Sales and Business Development activities to win the deal

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| **CORE SKILLS** | |
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| **SOLUTION ARCHITECT** | |
| ● | Facilitate and lead in gathering of business cases and user stories with key business users. |
| ● | Conduct solution architecture reviews with the project team prior to design the development activities and ensure solution is scalable and aligned with internal product roadmaps and meets customers’ business requirements. |
| ● | Prepare Business Process, Process Flow Analysis, Requirements Definition, Configuration Workbook, Data Models, Detailed Functional Design, Executive Summaries and Project Plans. |
| ● | Lead work of the project team including functional and technical consultants assigning duties, setting deadlines, monitoring progress and performing applicable follow-up with the client. |
| ● | Leveraging acumen to understand underlying client business problems, while developing and delivering Salesforce technology-enabled solutions that addresses the identified issues. This includes understanding the sales, service and marketing functions within the organization and how the technology will help streamline organizational needs. |
| ● | Owns the overall design of the application, functional and technical by mapping business cases and user stories to system/technical requirements within Salesforce functionality. |
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| **CLIENT DELIVERY AND PROJECT MANAGEMENT** | |
| ● | Manage and build client relationships with key decision makers from project inception to post-implementation; ensure customer satisfaction. |
| ● | Responsible to ensure that business and assignment risks are identified, monitored and managed to achieve minimal disruption to the project delivery and success. |
| ● | Manage a team of functional and technical consultants that will be staffed projects. |
| ● | Analyzes and identifies areas of risk and develops plans to minimize. |
| ● | Developing project plans and creating estimations for tasks as well as coordinate and manage the project tasks on time and under budget, manage the projects on a day to day basis, document meetings carefully, maintain repository of content. |
| ● | Lead a team of functional and technical consultants both on shore and off shore to implement the solution. |
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| **TEAM DEVELOPMENT AND MENTORING** | |
| ● | Contribute regularly to team meetings though leading whiteboard session and creating data models. Working closely with solution architects, technical teams and clients to deliver project scope on time and with high quality deliverables. |
| ● | Coach and mentor functional & technical resources on projects, including off-shore resources. |
| ● | Ensures utilization of staff is optimized by tracking individual team member forecasts and working with key staff to ensure team members are appropriately staffed on projects. |
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| **SALESFORCE** | |
| ● | Perform hands-on solution design for Salesforce, Financial Services Cloud and Apttus CPQ/CLM and other related technologies, solution architectures, architecture roadmaps, and prototyping, proof-of-concepts, and development tasks as required in support of current and new projects. |
| ● | Declarative customization including the creation of Flow, Process Builder, Approval Processes, Validation Rules, Workflow rules, Reports and Dashboards. |
| ● | Demonstrates proven intimate knowledge of and success in roles with assisting large employers on the performance improvement of their Sales, Service and Marketing organizations. |
| ● | Performed sales demonstrations, completed RFP’s & SOW’s, and advanced the sales cycle by providing required information to key decision makers. |
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| **QUOTE TO CASH (CPQ AND CLM – APTTUS, ORACLE AND SALESFORCE)** | |
| ● | In-depth background with the Quote to Cash process from product configuration, document design to accounts receivables. |
| ● | Product configuration which includes standalone items, bundles and structures, pricing rules, pricing dimensions, inclusion and constraint rules. . |
| ● | Design complex legal documents with dynamic document assembly and conditional agreement and clauses. |

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| **EMPLOYMENT HISTORY** | | |
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| **Pricewaterhouse Coopers Advisory LLC** | **2015 to Current** | **Senior Solution Architect** |
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| Health Cloud and Vlocity for Salesforce Solution Architect (Healthcare and Insurance)  Solution Architect works with a team of functional and technical consultants helping our clients solve their complex business issues from strategy to execution.  Leverage the **Financial Services Cloud** for:   * Sold a deal worth $12MM for an international wealth management firm, to manage a clients household, utilizing the various dashboards for analytical reporting and the Marketing Could to communicate with their clients. * Large global wealth management firm, leverage there ability to manage events and seminars to sell retirement plans. * Utilized the My Clients Dashboard to manage risk and portfolio management. * All executives and managers to utilized the various dashboards for managing team leadership and sales performance management. * Leverage Tableau for a US based regional retail bank, for client relationships and up selling. * Utilized Client segmentation to manage a banks book of business. * Leverage the Household functionality to manage the assets of individual family members in a household. * Large retail bank leveraged the Financial Services Cloud and Marketing Cloud to manage the various events and workshops on retirement planning and the various savings programs they offer to their customers.   Deliver Salesforce **Health Cloud** for:   * Insurance firm for membership management case escalation. * Call center for a large insurance firm to manage case management, live agent for customer collaboration and case assignment. * Multi-location urgent care facility for patient care, care team management and care plan management. * Multi-location hospital for community outreach programs, referral management, scheduling.   Demonstrates thorough knowledge and success with leading efforts to understand, assess, consult, design, implement and train on Salesforce and CPQ, Financial Services Cloud (Wealth Management and Insurance) based solutions. Implement CPQ ( Apttus and Salesforce)for medical device firms.  Experience carrying a business development quota and leading business development pursuits end-to-end. | | |
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| **IBM Global Services** | **2004 to 2015** | **Senior Managing Consultant** |

**Salesforce Solution Architect / Project Manager**

Salesforce and CPQ Solution Architect works with a team of functional and technical consultants helping our clients solve their complex business issues from strategy to execution. Demonstrates thorough knowledge and success with leading efforts to understand, assess, consult, design, implement and train on Apttus, Salesforce and Oracle based solutions.

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| **EDUCATION AND CERTIFICATIONS** | | |
| **UNDERGRADUATE** |  |  |  |
| Delaware Valley University, Doylestown, PA Bachelor of Science in Accounting and Marketing  **CERTIFICATIONS**  **APTTUS CORPORATION**  **CPQ**  201 CPQ Product Certification Level 1, 2,320  **CLM**  Apttus 201 CLM Product Certification Level 1  **SALESFORCE**  Certified Application Architect (Work in Progress, estimated date of completion 2021)  **Building Applications with Force.com and Visualforce (DEV401)** |  |  |  |

Salesforce CPQ