**Robert Boyd**

San Francisco, California ● (408) 460-9068 (mobile) ● robertboyd9@yahoo.com

**SUMMARY**

* Quote-to-Order expert (BA, BSA, configuration engineer, and/or solution architect) with 14 years of requirements analysis, design, build, test, and deploy experience on Salesforce.com (SFDC) and Microsoft Dynamics 365
	+ - * Lead meetings to document as-is/to-be business process flows, user reqs, use cases, user stories, ER diagrams, object data model, FRD, and solution design; configure Vlocity, Apttus, or SFDC applications; manage testing (unit, QA, UAT); manage or own cut-over from sandbox-to-production instances
* Agile Scrum & Waterfall projects with various clients include the following:
	+ - * 2014 to present
				+ Apttus CPQ, Deal Maximizer, CLM, IWA, Order Management, Billing Management, and X-Author (Word/Outlook/Excel /Cloud) implementations, data migrations, and integrations
				+ Vlocity CME (T-Mobile) & Public Sector (US State) proof of concept work
				+ NPI’s
			* 2007 to 2013
				+ SFDC Sales Cloud (Campaigns/Lead/Account/Opportunity Management, custom Territory Alignment, custom Account Family) and Service Cloud (Case/Knowledge Management, Communities, CTI, Call Recording, WFM) implementations & data migrations
				+ SFDC & ERP (Oracle & NetSuite) integrations with Dell Boomi, Informatica, Celigo, and Jitterbit
* Certifications
	+ - * Vlocity Platform Consultant I, Platform Developer I, and Communications Consultant I; Apttus CPQ 201 and Apttus CLM 201; and SFDC ADM 201

**EXPERIENCE**

NielsenIQ, San Francisco, California

**Solution Architect (Contractor)** 8/2021 - Present

* Solution architect for Apttus CLM/IWA & DocuSign implementation and accountable for running workshops, documenting user requirements, solution design, and sandbox-to-sandbox & sandbox-to-PROD activities
* Work with Dynamics 365 & integrations teams to understand the scope of quote header, line item, and payment schedule data needed in Apttus and the one-way & two-way integration points needed between Apttus and them

DocuSign, San Francisco, California

**Solution Architect (Contractor)** 7/2020 – 9/2021

* Worked on strategic initiatives which included building the FY 2021 quote-to-order project roadmap and doing solution architect work for the Apttus CPQ/IWA, DocuSign CLM, Zuora Billing for B2C, Oracle Subscription Management (OSS) for B2B project tracks.
* Assess potential upgrade of Apttus CPQ application and do deep dive assessment of Apttus CPQ problems (Apex code problems, downstream problems/impacts to billing management, and asset management problems).

HealthEquity, San Mateo, California

**Sr. Business Systems Analyst (Contractor)** 12/2019 – 8/2020

* BSA & solution architect for Apttus CPQ/CLM/IWA/OM & Adobe Sign post implementation & upgrade project work.
* Accountable for all Apttus-based and Adobe Sign user requirements, process flow diagrams, user stories, solution design documents, configuration/build, UAT coordination, and deployment activities.

Splunk, San Francisco, California

**Sr. Business Systems Analyst (Contractor)** 9/2019 – 1/2020

* IT BSA for Apttus CLM/IWA & DocuSign post-implementation project work and accountable for CLM user requirements, user stories, solution design document, configuration/build, and deploy activities.
* Collaborate with offshore development & QA team and delegate configuration & development tasks to them and work with QA team on test cases & bug fixes.

iHeartMedia, San Francisco, California

**Solution Architect / Business Analyst (Contractor)** 2/2019 – 8/2019

* Solution architect for Apttus CLM/IWA implementation and accountable for user requirements, user stories, solution design document, configuration/build, and deploy to Salesforce production environment activities.
* Configure Apttus CLM/IWA based on requirements/design and perform (end-to-end) unit tests for one client, and work with business on UAT for both clients.
* Collaborate with training resource on Apttus PPTX training documentation and perform live demo for one client.

Johnson & Johnson, San Francisco, California

**Solution Architect (Contractor)** 7/2018 - 12/2018

* Solution architect for Apttus CPQ/CLM/IWA/OM on Lightning and DocuSign implementation and accountable for overall solution design, documentation, configuration/build, and deploy activities.
* Collaborate with team on following: BA’s on user requirements, Scrum Master & BA on user story backlog, enterprise architect on solution design, delegate configuration of Apttus CPQ/CLM/IWA & DocuSign to offshore team (or configure myself), lead Sprint business demo’s with my team, work with business on UAT.

Twitter, San Francisco, California

**Solution Architect / Business Analyst (Contractor)** 6/2016 – 10/2016 **and** 3/2017 – 6/2018

* BA & solution architect for Apttus CLM/IWA on Lightning & Adobe Sign implementation and accountable for CLM user requirements, user stories, solution design document, configuration/build, and deploy activities.
* Configure Apttus CLM/IWA & Adobe Sign based on requirements/design, perform unit tests, work with developer on Apex triggers, QA on test case scripts & bug reviews/fixes, and work with business on UAT.
* Collaborate with Training resource on Apttus training documentation (PPT’s, user guides, etc).

Deutsche Bank, Frankfurt Am Main, Hesse, Germany

**Solution Architect / Business Analyst (Contractor)** 10/2016 – 4/2017

* BA & solution architect for Apttus CLM implementation on Lightning and accountable for creation of user/functional reqs, to-be process flows, creating solution design doc, and work w/ developer on Apex code triggers & VF pages.
* Configure Apttus CLM based on requirements/design, perform unit tests, work with QA on test case scripts & bug reviews/fixes, and work with business users during UAT.
* Create Apttus training documentation (PPT’s, user guides, etc) for end-users.

FireEye, Milpitas, California

**Sr. Business Analyst (Contractor)** 8/2015 – 4/2016

* NPI (new product introductions) IT BA, which involved BRD reviews, user story creation, SFDC change impacts, gap analysis mapping, and FSD creation; led testing (QA, UAT) & bug reviews; and deployment.
* Collaborated with SFDC, Oracle, and licensing architects on design, POC’s/CRP’s; and with business (Sales Ops, Licensing, Order Mgmt, Fulfillment, RevRec, Legal, and Support) on BRD’s, testing scripts.
* Collaborated with BSA’s & solution architect’s on document creation of CPQ user requirements and approval use cases for Apttus & Steelbrick vendor scoping and POC’s.

Genomic Health, Redwood City, California

**Sr. Data Analyst (Contractor)** 10/2014 – 10/2015

* Managed data migrations for SFDC and Apttus CPQ/CLM tracks by documenting source-to-target mappings, data analyses w/ SQL, worked with ETL/QA/BI/business teams on data, bugs, validations, cut-over, etc.
* Collaborated with PO, vendors, and ITQA on use cases, user stories, solution design, FSD’s, test cases, Sprint showcases, and object configuration guide for insurance payer and 3rd party vendor tracks.
* Collaborated with cross-functional teams on integration points for Netsuite, Apttus, and 3rd party vendors—documenting field mappings, uni- or bi-directional feeds on fields across objects, diagrams, data, etc.

Adobe Systems, San Jose, California

**Sr. Business Solutions Analyst (Contractor)** 12/2013 – 8/2014

* IT BSA on global B2B lead scoring, inquiry management, and form migration tracks for an implementation from Eloqua to a new marketing automation application: Adobe Campaign (formerly, Neolane).
* Managed work with SME’s on creation of use cases, to-be process flow diagrams, ER diagrams, data model, and FSD across all tracks; worked with architects on solution design; collaborated with ITQA on test scripts/plans and managed SIT/UAT testing; created user guides.
* Led Campaign, Campaign Member, Lead, and custom object data analyses, mapping, migration, validation, cut-over, and post cut-over activities from Neolane’s on-premise SFA to Adobe’s SFDC instance.

*Prior Experience*: **Sr. Business Systems Analyst (Contractor)**, Yahoo!, 10/2012 – 12/2013; **Sales Operations Business Analyst (Contractor)**, Google, 1/2012 – 10/2012; **CTI / SFDC Business Analyst (Contractor)**, Symantec, 7/2011 – 1/2012; **Marketing Business Analyst (Contractor)**, Cisco Systems, 1/2011 – 7/2011; **SFDC Business Analyst (Contractor)**, Aruba Networks, 6/2010 – 1/2011; **SFDC Business Analyst (Contractor)**, VMware, 1/2010 – 6/2010; **Sales Operations Analyst**, Trimble Navigation, 9/2007 – 1/2010; **VC Analyst**, TechStock, 5/2005 – 7/2007; **Local Network Administrator (LNA)**, Stanford University, 2/1999 – 11/2004

**EDUCATION**

[San Jose State University](http://www.cob.sjsu.edu/),San Jose, California

**Bachelor of Science, Business – MIS (Management Information Systems)**, May 2005