

Summary

Consulting leader with over twenty years experience helping clients achieve their goals with CRM technology. Able to work effectively at all organization levels, and to manage both the business and technical elements required for successful CRM initiatives. Strong team leader and mentor. Published author on the topic of building successful CRM programs.

Scott spent years in a project management capacity, delivering successful CRM engagements on the ONYX and Microsoft Dynamics platforms, before moving into practice leadership roles. Scott built profitable consulting teams delivering projects on the Microsoft Dynamics and Salesforce platforms, with responsibilities that included marketing, sales, recruiting, solution architecture, methodology development, and employee development.

In 2015 Scott transitioned to independent CRM consulting on the Salesforce.com platform, to return to working directly with clients to help them execute their CRM initiatives.

Key Skills

- CRM Program Strategy, Planning, Development
- CRM Project Delivery on the Salesforce Platform (including analysis and application design, application configuration, data migration and integration, testing, user training)
- Salesforce Development (Apex/Visualforce/Lightning Web Components)

Sample Projects

CLIENT: GLOBAL ENTERPRISE DATABASE SOFTWARE FIRM

- Technical architect and developer on the Salesforce platform. Implemented foundational frameworks in apex for trigger logic and asynchronous logic
- Implemented integration between Salesforce and JIRA using Amazon Web Services Lambda and SQS services
- Technical Lead and Project Manager for the deployment of a new quoting solution using Zuora CPQ and DocuSign, integrated with Salesforce
- Developed multiple Lightning Components to enhance the Salesforce user experience for GDPR compliance, to support a named account program, and to increase usability.

CLIENT: SOFTWARE-AS-A-SERVICE TECHNOLOGY FIRM

- Developed Ruby scripting to divide 8,000 named accounts from Salesforce into cohorts and equitably assign them to the account executive team while enforcing the client's business logic around account assignment.
- Developed an Apex-based automation engine to support the named account program, including scenarios such as account executive on-boarding and off-boarding, and out-of-territory account repatriation.

CLIENT: SENIOR SERVICES ADVISORY FIRM

- Implemented a Visualforce solution to create geographic account clusters for a named account sales territory program.
- The resulting solution groups over 150,000 Salesforce Accounts into ~1,200 named account territories according to the client's business rules

CLIENT: REGIONAL WEALTH MANAGEMENT FIRM

- Worked with firm leadership team to develop Salesforce roadmap to reinvigorate failing Salesforce implementation and realign application with business priorities

Experience

MAR 2015 - PRESENT INDEPENDENT CRM CONSULTANT / DECIMAL

JAN 2014 - MAR 2015 DIRECTOR, WEST REGION CRM / WEST MONROE PARTNERS

- Responsible for all elements of West Monroe's CRM practice in the western United States after its acquisition of Madrona Solutions Group.
- Managed 15-person team delivering Salesforce.com and Microsoft Dynamics CRM services.
- Acted as solution architect and quality assurance review for CRM projects.
- Drove over \$1M in annual services revenue.
- Worked with other West Monroe practices and offices to cross-sell CRM services.
- Implemented internal processes to ensure project quality, knowledge transfer, and skills development.

OCT 2005 - DEC 2013 PRINCIPAL AND CO-OWNER / MADRONA SOLUTIONS GROUP

- One of three owners who grew Madrona Solutions to 30+ people, \$7M in revenue, and consistent profitability.
- Led CRM practice for Madrona Solutions, delivering both Microsoft Dynamics CRM and Salesforce.com services.
- Developed Madrona's CRM implementation methodology and internal project delivery processes.
- Acted as solution architect and quality assurance review for CRM projects.
- Led many Dynamics CRM implementation projects for clients, including process analysis, data migration, custom development, and integration elements.
- Drove over \$1M in annual services revenue.

NOV 2002 - OCT 2005 PRODUCT PLANNER, DYNAMICS CRM / MICROSOFT

- Member of Dynamics CRM product development team, involved with planning for the 1.2 and 3.0 releases.
- Worked with leadership and program management to prioritize product features and develop licensing models.
- Conducted market research to inform product direction.
- Managed Dynamics CRM customer and partner advisory boards.

OCT 2001 - OCT 2002 SOLUTION SPECIALIST / MICROSOFT

- Field sales resource focused on Windows and Office sales to state and local government. Based in New York.

FEB 1998 - AUG 2001 SENIOR CRM CONSULTANT / EQUARIUS

- Led implementation projects of ONYX CRM nationwide. Clients included Leviton Telcom, US Central Credit Union, and Interwoven.

Certifications

SALESFORCE.COM	Administrator	Data Cloud Consultant	SCRIBE	Scribe Online Certified
	Platform Developer I / II		SOFTWARE	

Publications

CRM Fundamentals, co-authored with Mathew Johnson and Brian Paulen. New York: Apress, 2011.

Build a Solid CRM Foundation, co-authored with Mazen Ghalayini. *Destination CRM (CRM Magazine)*. March 21, 2014